

Working with Alts, Upgrades, and Options

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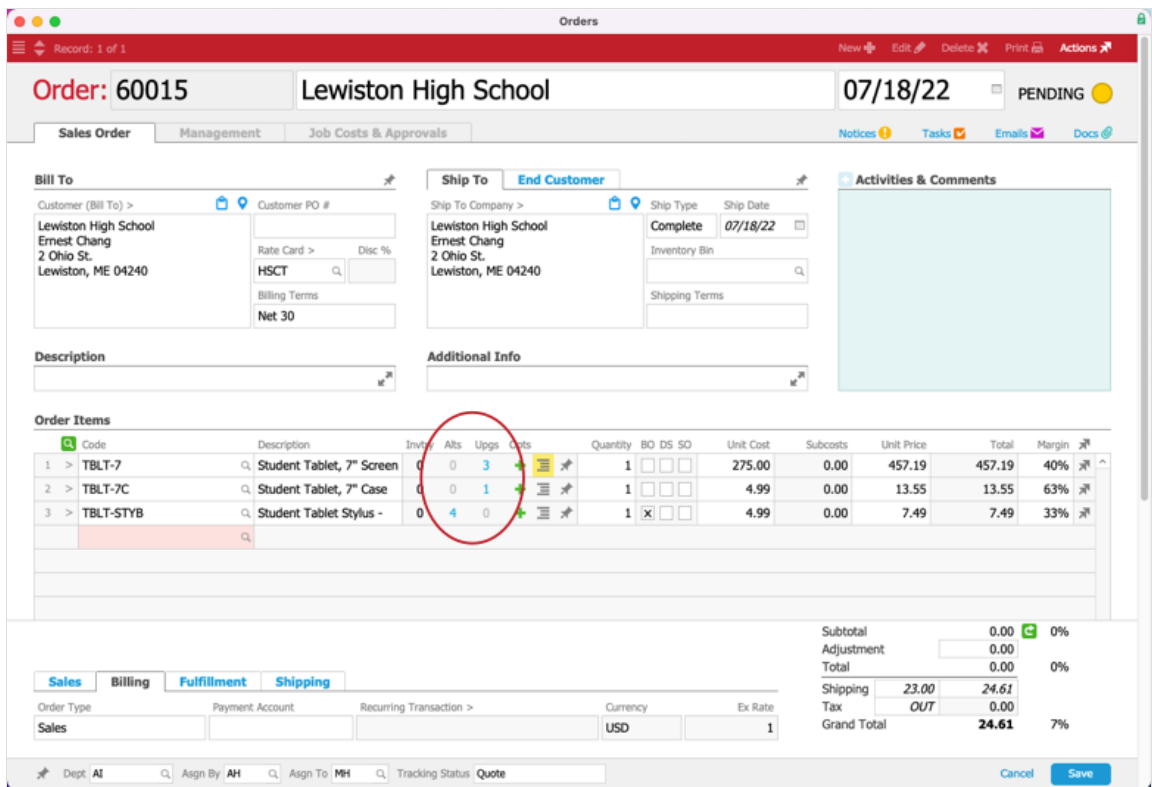
This guide explains how to use alternates, upgrades, and options for your products. It is intended for general users.

Alternates (Alts) and upgrades (Upgs) are substitute or complimentary items for line item codes (LICs). Sales personnel can use alts and upgrades to discuss variations on customer orders or to handle situations where there is insufficient inventory. See below for more detail.

Options (Opts) are used for making custom bundles that are unique and have no Bill of Materials. They do not need to be linked to an LIC record in advance, so they can be applied on-the-spot. The use of Opts in an LIC's placement also affects job generation for fulfillment of an order. See below for more detail.

Alternatives and Upgrades

Alts and upgrades are configured at the Line Item Codes module ([see below](#)), but you use alts and upgrades at the Orders module. These columns only appear when editing the record.



Using Alts as Substitute Products

Click the number in the **Alts** column, then use the Options Selector to pick the desired replacement. aACE *removes* the initial LIC and enters the new LIC on that line.

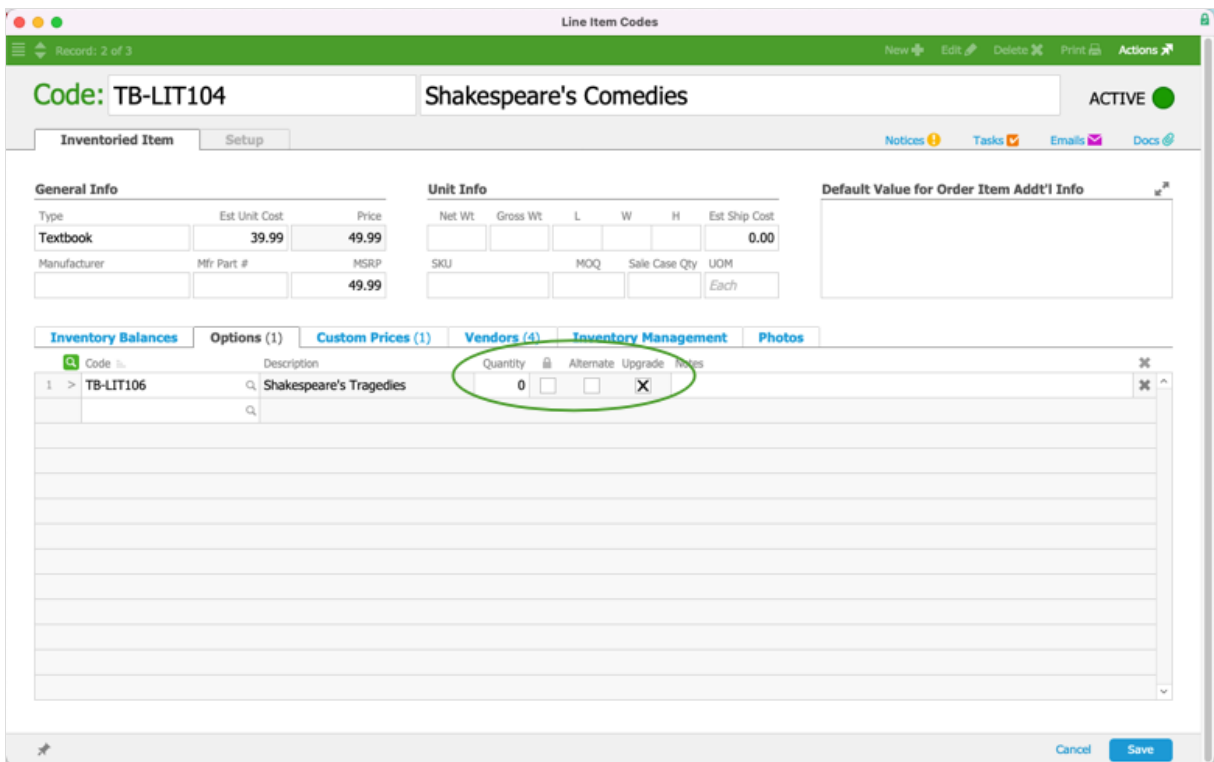
Using Upgrades as Complimentary Products

Click the number in the **Upgs** column, then use the Options Selector to pick the desired addition. aACE adds the new LIC(s) to the order with the Description indented below the 'parent' LIC.

Configuring LICs for Alts and Upgrades

You can organize your [line item codes](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#LICoptions) to use as alts or upgrades.

1. Navigate from **Main Menu > Order Setup > Line Item Codes** and locate the LIC that will be the 'parent' item (i.e. the item that will be replaced by an alternate or joined by an upgrade).
2. At the detail view, click **Edit**.
3. At the **Options** tab, enter each LIC that can be used as an alt or upgrade item.



4. Specify the **Quantity** that should be *automatically* entered for each unit of the parent item (see below for details).

5. Mark the flag for **Alternate** or **Upgrade**.
6. Click **Save**.

Quantities on Alt / Upgrade Child Items

At the parent LIC record, the Quantity field for the alt / upgrade item sets a numerical relationship between the parent and alt / upgrade:

- Zero – No default quantity; team members must manually enter a quantity when they add it to an order.
- One or higher – aACE automatically adds that many alt / upgrade LICs for *each unit* of the parent LIC.

Example: Suppose an upgrade LIC was set with a Quantity of three. In an order that included two units of the parent LIC, aACE would automatically enter six as the quantity for the upgrade LIC (i.e. three for each parent item).

Reviewing LICs that Have Alts or Upgrades

You can see which LICs already have alts or upgrades assigned to them by navigating from Main Menu > Order Setup > Details > LI Code Options. Then search using the Option Rec Type column:

Code	Type	Option	Option Type		Quantity	Unit Est Cost	Option Total
> WS-SSA-P	Workshop	> WS-SSA-C	Workshop	ALTERNATIVE	0	500.00	0.00
> WS-SSA-P	Workshop	> WS-SSA-S	Workshop	UPGRADE	0	250.00	0.00
> TB-FRNCH3	Textbook	> TM-FRNCH3	Textbook	ALTERNATIVE	0	74.99	0.00
> TB-FRNCH3	Textbook	> WKBK-FRNCH3	Workbook	UPGRADE	1	19.99	19.99
> BOM-ZT-B	Pack	> BOM-ZT-W	Pack	ALTERNATIVE	1	0.01	0.01
> BOM-ZT-W	Pack	> BOM-ZT-B	Pack	ALTERNATIVE	1	0.01	0.01
> TB-LIT104	Textbook	> TB-LIT106	Textbook	UPGRADE	0	39.99	0.00
> TB-LIT106	Textbook	> TB-LIT104	Textbook	UPGRADE	2	39.99	79.98
> TBLT-STYB	Technology	> TBLT-STYR	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYG	Technology	> TBLT-STYR	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYG	Technology	> TBLT-STYB	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYY	Technology	> TBLT-STYR	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYY	Technology	> TBLT-STYB	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYY	Technology	> TBLT-STYG	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYP	Technology	> TBLT-STYR	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYP	Technology	> TBLT-STYB	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYP	Technology	> TBLT-STYG	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYP	Technology	> TBLT-STYY	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-9	Technology	> TBLT-STYB	Technology	UPGRADE	0	4.99	0.00
> TBLT-STYB	Technology	> TBLT-STYG	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYB	Technology	> TBLT-STYP	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYB	Technology	> TBLT-STYY	Technology	ALTERNATIVE	1	4.99	4.99
> TBLT-STYR	Technology	> TBLT-STYB	Technology	ALTERNATIVE	1	4.99	4.99

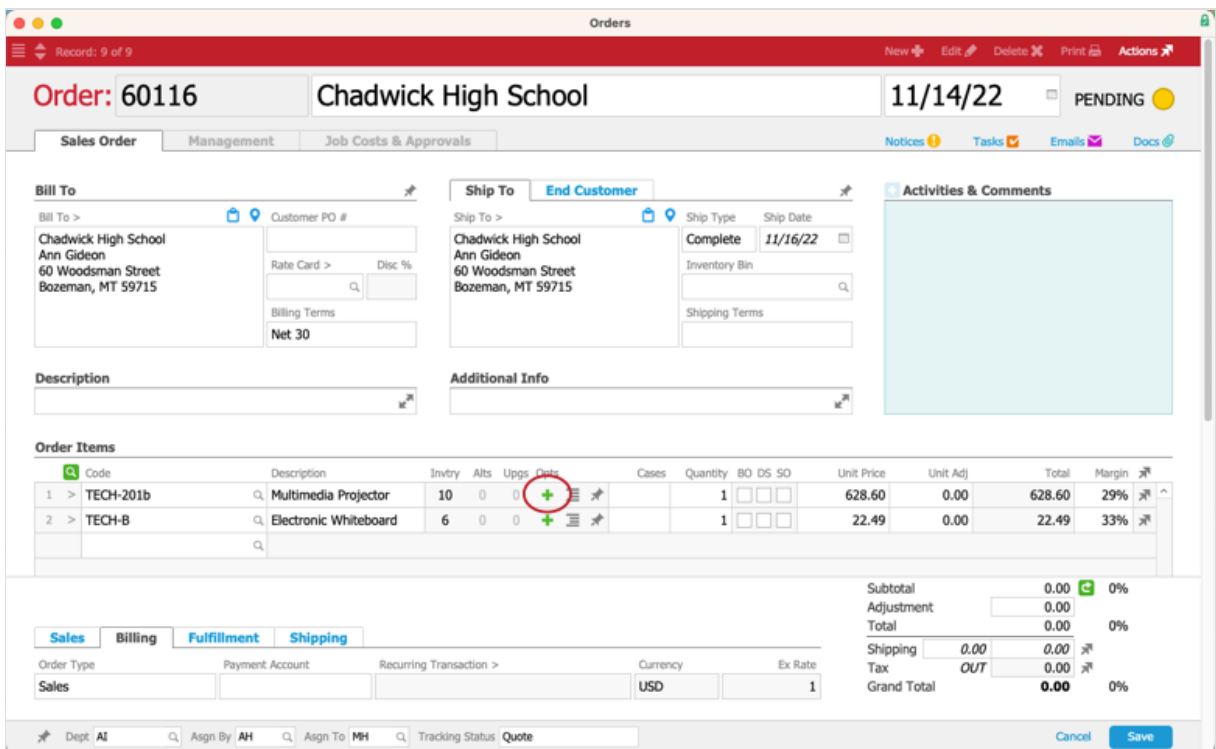
Options

You can use options add other LICs to an order. You must first enter an initial LIC as the 'parent' item at the root level. The LICs you add as options are indented under the parent item. This allows you to create a custom Bill of Materials (BOM), adding any LIC you desire as an Opt inside a particular bundle:

- Root-level LICs – Overall bundle or product
- Non-root level LICs – Items in the ad hoc Bill of Materials

Using Opts

1. At the Orders list view, click **New** and your desired order type.
2. Fill out the basic information in the order, including an initial parent item in the Order Items section.
3. Click the **Opts** (+) icon for the parent item.



4. At the Line Item Codes Selector, use the Quick Search bar to find your desired LIC, or [create a new LIC](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes). aACE adds the LIC a 'child' item under the initial LIC, with the Description text indented:

New Edit Delete Print Actions
Record: 9 of 9

Order: 60116

Chadwick High School

11/14/22

PENDING

Sales Order
Management
Job Costs & Approvals

Notices
Tasks
Emails
Docs

Bill To

Chadwick High School
Ann Gideon
60 Woodsmen Street
Bozeman, MT 59715

Customer PO #

Rate Card > Disc %

Billing Terms
Net 30

Ship To End Customer

Chadwick High School
Ann Gideon
60 Woodsmen Street
Bozeman, MT 59715

Ship Type: **Complete** Ship Date: **12/16/22**

Inventory Bin

Shipping Terms

Activities & Comments

Description

Additional Info

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 >	TECH-201b	10	0	0	+		1				628.60	0.00	628.60	29%
2 >	JOB-VP	0	0	0	+		1				1,260.00	0.00	1,260.00	50%
3 >	TECH-B	6	0	0	+		1				22.49	0.00	22.49	33%

Subtotal	1,911.09	43%
Adjustment	0.00	
Total	1,911.09	43%
Shipping	0.00	
Tax	OUT 0.00	
Grand Total	1,911.09	43%

Sales
Billing
Fulfillment
Shipping

Order Type	Payment Account	Recurring Transaction >	Currency	Ex Rate
Sales			USD	1

Dept: AI Asgn By: AH Asgn To: MH Tracking Status: Quote

Cancel Save