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 (<u>see below</u>), but you use alts and upgrades at the Orders module. These columns only appear when editing the record.

•			Orde	ers							
Record: 1 of 1							New 🖶 🛛 Edit	t 🖋 🛛 Delete 🗙	Print	🖶 Act	ions 🛪
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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 <u>line item codes (https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#LICoptions)</u> to use as alts or upgrades.

- 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.

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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:

Record: 1 of 83					New 🖶 Edit 🖋	Delete 🗶	Print 🖶 Actio	ns 🖈
Options								
				1				Q
L Code Q	Туре	Option Q	Option Type	ALTERNATIVE	Quantity	Unit Est Cost	Option Total	<u> </u>
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> WS-SSA-P	Workshop	> WS-SSA-S	A Workshop		0	250.00	0.00	7
> TB-FRNCH3	Textbook	> TM-FRNCH3	📌 Textbook	UT GIVIDE	0	74.99	0.00	7
TB-FRNCH3	Textbook	> WKBK-FRNCH3	📌 Workbook	UPGRADE	1	19.99	19.99	r,
BOM-ZT-B	Pack	> BOM-ZT-W	🖈 Pack	ALTERNATIVE	1	0.01	0.01	R.
BOM-ZT-W	Pack	> BOM-ZT-B	🖈 Pack	ALTERNATIVE	1	0.01	0.01	Ā
> TB-LIT104	Textbook	> TB-LIT106	A Textbook	UPGRADE	0	39.99	0.00	r,
TB-LIT106	Textbook	> TB-LIT104	🖈 Textbook	UPGRADE	2	39.99	79.98	7
TBLT-STYB	Technology	> TBLT-STYR	🖈 Technology	ALTERNATIVE	1	4.99	4.99	R.
BLT-STYG	Technology	> TBLT-STYR	🖈 Technology	ALTERNATIVE	1	4.99	4.99	r,
BLT-STYG	Technology	> TBLT-STYB	* Technology	ALTERNATIVE	1	4.99	4.99	r,
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> TBLT-STYY	Technology	> TBLT-STYB	🖈 Technology	ALTERNATIVE	1	4.99	4.99	*
> TBLT-STYY	Technology	> TBLT-STYG	🖈 Technology	ALTERNATIVE	1	4.99	4.99	r,
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TBLT-STYB	Technology	> TBLT-STYY	* Technology	ALTERNATIVE	1	4.99	4.99	٣
TBLT-STYR	Technology	> TBLT-STYB	* Technology	ALTERNATIVE	1	4.99		7

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.

Orde	er: 60116	Chadwic	k High School					11/14	1/22				-
Jide	. 00110	Chauwic	K HIGH SCHOOL					11/1.	1/22	F	PENDI	NG	0
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Bill To >	ĉ 오	Customer PO #	Ship To >	Ô 9	Ship Type	Ship Date							
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Bozeman, MT 59715	n, MT 59715	٩	Bozeman, MT 59715				Q,						
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order It	ems	R ₂					κ _N						
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Order Typ				USD		1		and Total		0.00	0%		

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

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Bill To >	📋 ♀ Customer PO #	Ship To >		Ô 9	Ship Type	Ship Date							
Chadwick High School		Chadwick High School			Complete	12/16/22							
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Bozeman, MT 59715	Q,	Bozeman, MT					Q,						
	Billing Terms				Shipping Ter	ms							
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Order Items												_	
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