

Item Substitution on a Sales Order

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Overview

During our [onboarding](#) you learn about editing [Item Details](#). Today we take a look back on the Related Items tab for an individual Item. By adding Related Items as a Replacement, you can prepare your Sales Team for a stock out situation. When there is no quantity for Item A, and you've selected Item B as a Replacement, you can quickly substitute one for the other and make your Sale!

Setting up Replacements

1. Click on the **Open Full** List drop-down menu and select **Items**.
2. Click the **Name/Number** of the item. **This will lead you to the Items page to edit.**

ID	NAME / NUMBER	TYPE	GROUP	DESCRIPTION	UOM	ACTIONS
2	Plumbing101	Service	Services Group	Plumbing services	HR	[edit] [delete] [refresh]
3	HKService	Service	Services Group		HR	[edit] [delete] [refresh]
4	Service Provider 1 PITM	Part	Parts Group		HR	[edit] [delete] [refresh]
5	Bell Inc.	Service	Services Group		HR	[edit] [delete] [refresh]
6	styletest	Part	Style	test for style	HR	[edit] [delete] [refresh]
7	Plumbing102	Assembly	Assembly Group	test	HR	[edit] [delete] [refresh]

3. Click the **Related Items** tab

RELATED ITEM	DESCRIPTION	RELATION
TEST ITEM 1.0.35A-2		Replacement
TEST ITEM 1.0.35A-3		Replacement

Total Records: 2

On this tab, you can choose Items in your inventory that are somehow related to the current

item.

Related Item: Select a related item from the drop-down list.

Description: Enter a concise information about the item relation.

Relation: Choose **Replacement** - An item can be a Replacement when it can substitute for the current Item, usually if it is out of stock.

Click **Save**.

Item Relation

Related Item: Test Liquid1

Description: Replace with this item if you would like to add a pedestal to the original. This is the item that includes the pedestal

Relation: Replacement

Save Cancel

Using Substitution in a Sales Order

1. Create your **Sales Order**
2. Add Items to the **Sales Order** which have **Replacements**
3. You will notice that a new Icon appears next to the **Edit Line Item** Icon

Sales > Sales Orders > Sale Order

Sales Order - 10439

General: No. 10439, Client: 1111 Nelson Brothers - test CH, Date: 2/19/2024, Promise Date: 2/26/2024, Customer PO, Contact, Total Margin: 22.91, Total Margin Percentage: 6.4%

Summary Revision: 1

GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT.	AVAILABLE	ALLOCATED	DISCOUNT %	CLASS	REPLACED ITEM	REPLACED WITH	ACTIONS
Parts Group		1	112	VIRGIN RESIN	20.00	EA	12.50	250.00	9,567.75	0.00	16.7 %	Retail			
Parts Group		2	TEST ITEM 1.0.35A-1		1.00	EA	85.00	85.00	3.00	0.00	15.0 %	Retail			
Parts Group		3	TEST ITEM 1.0.35A-3		1.00	EA	21.25	21.25	0.00	0.00	15.0 %	Retail			

4. By clicking this **Substitute icon** you'll open up the **Replacement window**

Replace Item for Sales Order 10439 Line 2

Line 2: TEST ITEM 1.0.35A-1

REPLACEMENT	DESCRIPTION	AVAILABLE
<input type="checkbox"/>	TEST ITEM 1.0.35A-2	1,236.00
<input type="checkbox"/>	TEST ITEM 1.0.35A-3	0.00

Save Cancel

5. Choose from one of your **Replacement Items** and Click **Save**
6. Add the columns **Replaced Item** and **Replaced With** to your Sales Order Line Items to see in-depth information about the Substitutions

ALLOCATED	DISCOUNT %	CLASS	REPLACED ITEM	REPLACED WITH	ACTIONS
0.00	16.7 %	Retail			   
0.00	15.0 %	Retail	TEST ITEM 1.0.35A-1	TEST ITEM 1.0.35A-2	   
0.00	15.0 %	Retail			  

