## **Item Substitution on a Sales Order**

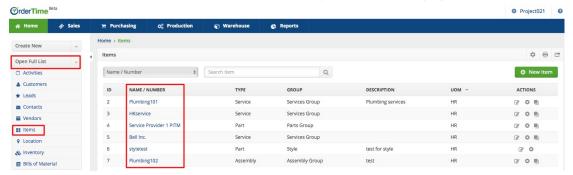
Last Modified on 02/19/2024 2:33 pm EST

## Overview

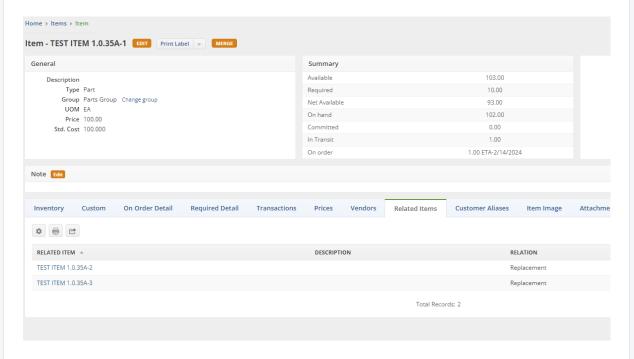
During our **onboarding** you learn about editing **Item Details**. Today we take a look back on the Related Items tab for an individual Item. By adding Related Items as a Replacement, you can prepare your Sales Team for a stock out situation. When there is no quantity for Item A, and you've selected 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.



3. Click the Related Items tab



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

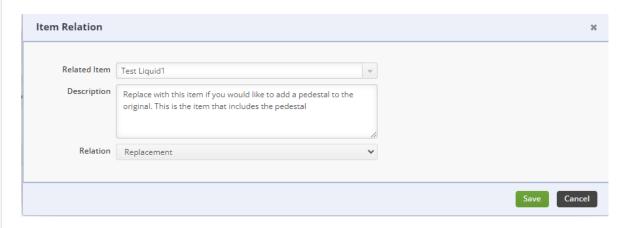
item.

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

**Description**: Enter a concise information about the item relation.

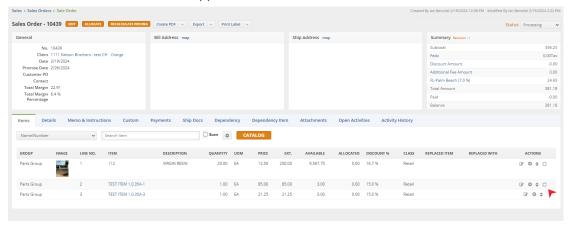
**Relation**: Choose **Replacement** - An item can be a Replacement when it can substitute for the current Item, usually if it is out of stock.

Click Save.



## 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



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



- 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

| ments | Open activities | ACTIVITY HISTORY |
|-------|-----------------|------------------|
|-------|-----------------|------------------|

| 0.00 16.7 % Retail | ALLOCATED | DISCOUNT % | CLASS  | REPLACED ITEM       | REPLACED WITH       | ACTIONS      |
|--------------------|-----------|------------|--------|---------------------|---------------------|--------------|
|                    | 0.00      | 16.7 %     | Retail |                     |                     | ♂ ♦ ○        |
| 0.00 15.0 % Retail | 0.00      | 15.0 %     | Retail | TEST ITEM 1.0.35A-1 | TEST ITEM 1.0.35A-2 | <b>♂ ≎</b> ○ |
|                    | 0.00      | 15.0 %     | Retail |                     |                     | ♂ ≎          |