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Item Replacement Sales Line Replacement

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Overview

Item Replacement allows users to set up replacement items in Inventory Lookup that will be suggested during Sales Document Entry when an item that has an available replacement is entered.

Security

Sales Line Replacement must be enabled in the Security Editor. In 4.1 and later versions, the *Show Only Available Items* sub-setting can be set to True to only display the Sales Line Replacement popup window when replacement items are available. This sub-setting will also default the value of the **Show Only Available Items** check box when the "Sales Line Replacement" screen is manually opened (True for checked, False for unchecked).

The screenshot displays the Security Editor window. At the top, there are buttons for 'Select All' (with a green checkmark), 'Select None' (with a blue square), and 'Copy From...'. Below this is a table with two columns: 'Access' and 'Name'. The table contains two rows: the first row has an unchecked checkbox and the name '*replacement'; the second row has a checked checkbox and the name 'Sales Line Replacement*'. Below the table is a filter bar with a red 'X' icon, a checked checkbox, and the text 'Contains([Name], 'replacement')'. To the right of the filter bar is an 'Edit Filter' button. Below the filter bar is a section titled 'Item_Replacement' with a sub-setting 'Show Only Available Items' set to 'True'. At the bottom of the window is a section titled 'Show Only Available Items' with a description: 'If set to true, Item Replacement plugin will show only items that are available. Defaults to 'False'.'

In 4.1 and later versions, *Item Maintenance* must be enabled to allow setting replacement items.

Usage

INVENTORY LOOKUP - SETTING UP/ VIEWING REPLACEMENT ITEMS

In Inventory Lookup, search for an item and open the Item Properties tab. An item's existing replacement item

will display in the Replaced By field.

In this example, the HD-40 is a replacement for the HD-20:

Item Inventory		Item Properties	Item Sales	Item Purchases	Item Notes	Item Serial/Lot Numbers	Item Analysis
Basic Info							
Item Number	HD-20						...
Description	20 Gig Hard Drive						
Short Description							
Generic Description							
Item Type	Sales Inv						
Item Class	RM-ACT						
Shipping Weight	0.00						
	User Field						
	Replaced By						HD-40

Quantity:
On Hand
On Order
Allocated
Backorder
Available
Reorder F

In 4.1 and later versions, this field cannot be edited from the Item Properties tab. To set replacement items in these versions, click the ellipsis (...) in the Item Number field to open the "Item Maintenance" screen (*Item Maintenance* must be enabled in the Security Editor).

On the "Item Maintenance" screen Item Information tab, enter a replacement item in the Replaced By field:

Item Maintenance

Item Information | Vendor Information (1) | Warehouse & Resource Planning

Properties

Item Number: WIRE-SCD-0001

Item Description: Single conductor wire

Short Description: Single wire

Generic Description: Wire

Replaced By:

Copy From Item: ...

Item User I


Product Pa

Id_xyz

SALES DOCUMENT ENTRY - VIEWING/SELECTING REPLACEMENT ITEMS

The Sales Line Replacement window is designed to display any hierarchy of related items that have been set up as replacements for others, providing an entire list of items to view and select from.

During sales document entry, the "Sales Line Replacement" window will pop up when an item with a replacement option is entered, or if the item is a replacement for other items, displaying a choice of items (and their Available Quantities) that can be added to the document:

At any point during sales document entry, you can access this list and choose a replacement item by selecting the line item, clicking the **Actions**  dropdown menu on the Line Items tab, and selecting Sales Line Replacement.