



USER GUIDE

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Acumatica Software Versions Supported – 2017R2, 2018R1, 2018R2, 2019R1, 2019R2, 2020R1, 2020R2, & 2021R1

INVENTORY SUBSTITUTIONS & UPSELL OVERVIEW

Inventory Substitutions & Upsell provides the user with the ability to easily find additional inventory items and cross sell opportunities when selected items are currently out of stock. Sales orders can be quickly processed since the user can make on-the-spot substitutions, including by warehouse, in order to increase the order fill rate.

- Enables easy setup of substitution items and upsell recommendations
- Provides the ability to quickly find alternate items if a requested item is out of stock
- Automatically suggests companion items to facilitate upselling

INSTALLING INVENTORY SUBSTITUTIONS & UPSELL FOR ACUMATICA

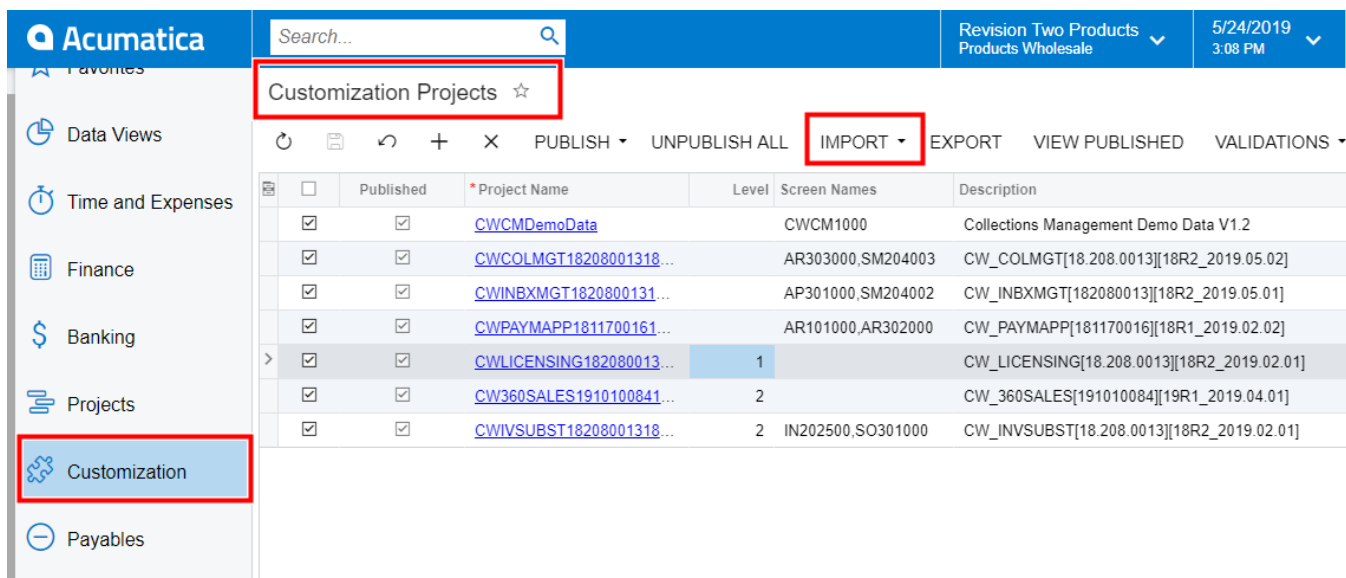
Installation of the Inventory Substitutions & Upsell for Acumatica is performed using the Acumatica Customization manager.

Inventory Substitutions & Upsell Installation

To deploy customizations, the user must be a member of the “Customizer” role. Crestwood recommends installation using the default “Admin” user however any user who is a member of this role will be sufficient. To provide “Customizer” role access to a user, please refer to the **Managing User Access Rights** in the **Acumatica Help Articles**.

Import Customization Projects

All customizations in the Acumatica instance are maintained in the “Customization Projects” screen of Acumatica. This screen is accessed from the following navigation Location: “Customization” -> “Customization Projects”.



	Published	*Project Name	Level	Screen Names	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCMDemoData		CWCM1000	Collections Management Demo Data V1.2
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWCOLMGT18208001318...		AR303000,SM204003	CW_COLMGT[18.208.0013][18R2_2019.05.02]
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWINBXMG1820800131...		AP301000,SM204002	CW_INBXMG1[182080013][18R2_2019.05.01]
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWPAYMAPP1811700161...		AR101000,AR302000	CW_PAYMAPP[181170016][18R1_2019.02.02]
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWLICENSING182080013...	1		CW_LICENSING[18.208.0013][18R2_2019.02.01]
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CW360SALES1910100841...	2		CW_360SALES[191010084][19R1_2019.04.01]
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CWIVSUBST18208001318...	2	IN202500,SO301000	CW_INVSUBST[18.208.0013][18R2_2019.02.01]

New Installation

To perform a new installation of Inventory Substitutions & Upsell for Acumatica to the Acumatica instance, the current versions of the customization project zip files, including **CWIVSUBST** and **CWLicensing**, must be imported into the Acumatica Instance. When the file(s) are uploaded, two new customization projects will be created based on the name of the file(s) uploaded.







- Both files should be published at the same time.
- If you would like to try Inventory Substitutions & Upsell for Acumatica prior to purchasing, the process to install is the same (including importing and publishing of the Inventory Substitutions & Upsell & Licensing Customization files) except they must be imported and published to a “Test” Tenant and all functionality is available for trial use.

- If the Files are imported and published to an “Active” Tenant, you must purchase license keys (or obtain a Trial License) in order to use the product.
- The module will not install or validate unless the CWLICENSING Package is published with the Module.
- To also add the *Inventory Substitutions & Upsell WIKI Help*, please Import and Publish the latest **CWIVSUBSTWIKI** customization package as well.





To try Inventory Substitutions & Upsell – Tenant Status must equal “Test Tenant.” (or if Active Tenant, request a Trial license). By installing in a Test Tenant, you can try all features of the product. Once installed in an Active Tenant, an active registration/license key is required

Products Wholesale ▾ Tenants ★







COPY TENANT CREATE SNAPSHOT RESTORE SNAPSHOT CHANGE TO TEST TENANT







Tenant ID:	2	Status:	Test Tenant
* Login Name:	Company	Tenant Name:	Company

[SNAPSHOTS](#)
[SNAPSHOT RESTORATION HISTORY](#)
[USERS](#)



IMPORT SNAPSHOT PREPARE FOR EXPORT ▾ EXPORT SNAPSHOT CHANGE VISIBILITY



To install Inventory Substitutions & Upsell in a **Production Environment** or **Active Status Tenant**, an active registration/license key is required to be entered in the Crestwood Licensing Screen.

Products Retail ▾ Tenants ★







COPY TENANT CREATE SNAPSHOT RESTORE SNAPSHOT CHANGE TO TEST TENANT

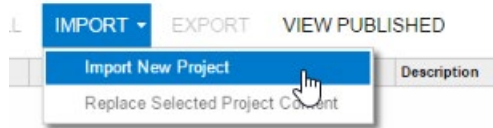
Tenant ID:	9	Status:	Active
* Login Name:	CA Products Company	Tenant Name:	CA Products Company

[SNAPSHOTS](#)
[SNAPSHOT RESTORATION HISTORY](#)
[USERS](#)



IMPORT SNAPSHOT PREPARE FOR EXPORT ▾ EXPORT SNAPSHOT CHANGE VISIBILITY

Access the **Customization Projects** Screen

1. Click **Import** button (NOTE: If the dropdown is selected on the right side of the button, two options will show. Select the **Import New Project** option.



2. In the **Open Package** dialogue box that appears, click the **Choose File** button



3. In the File browser, navigate to the location where the CWIVSUBST Customization zip file exists. Select the file and click the "Open" button. Go through Steps 2-4 again to import the CWLicensing.zip file. Both the module and license customization projects must be imported and published at the same time.
4. You will be redirected back to the **Open Package** dialogue box and the zip file name should show next to the **Choose File** button. Click the **Upload** button. Once the upload is complete, the Customization Project(s) will show in the **Customizations Project** Screen.

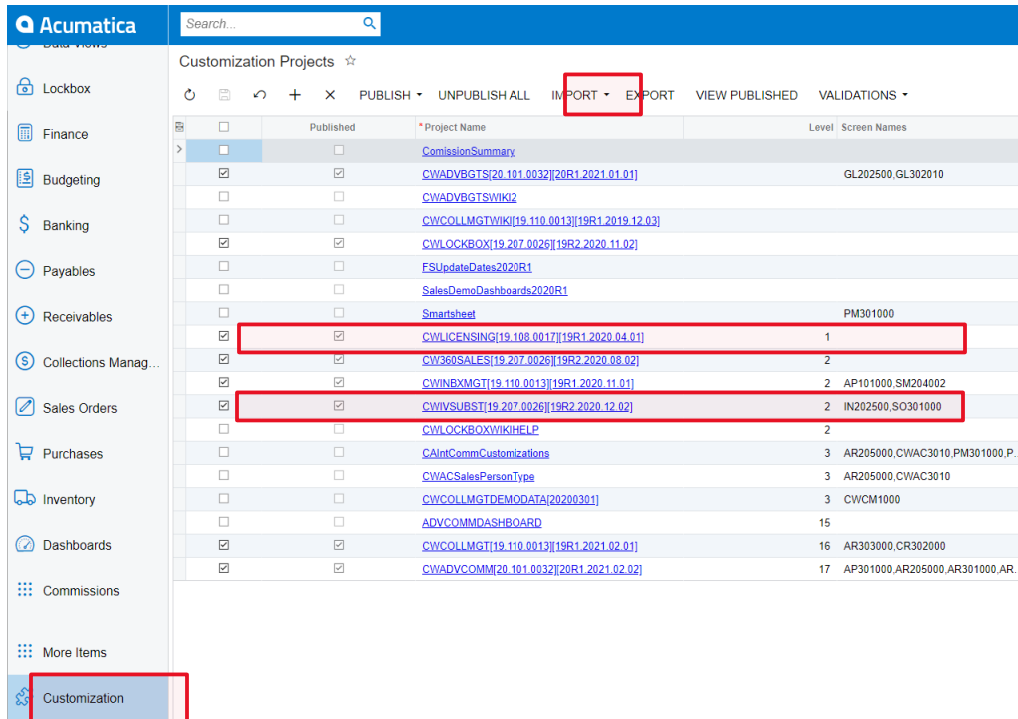


The amount of time it takes to upload the customization project (s) will depend on the size of the file and the internet speed.

Customization Upgrade

To update to the latest supplied version of Inventory Substitutions & Upsell for Acumatica, the following steps need to be performed:

1. Access the **Customization Projects** Screen
2. Select the Inventory Substitutions & Upsell Project (and updated Crestwood Licensing Project if provided)



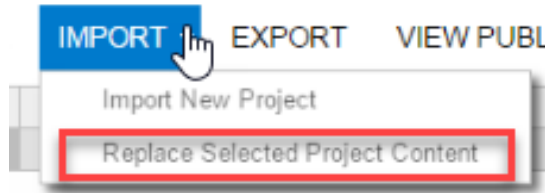
Published	Project Name	Level	Screen Names
<input type="checkbox"/>	CommissionSummary		
<input checked="" type="checkbox"/>	CWADVBGTS[20.101.0032][20R1.2021.01.01]		GL202500, GL302010
<input type="checkbox"/>	CWADVBGTSWIKI2		
<input type="checkbox"/>	CWCOLLMGTWIKI[19.110.0013][19R1.2019.12.03]		
<input checked="" type="checkbox"/>	CWLOCKBOX[19.207.0026][19R2.2020.11.02]		
<input type="checkbox"/>	FSUpdateDates2020R1		
<input type="checkbox"/>	SalesDemoDashboards2020R1		
<input type="checkbox"/>	SmartSheet		PM301000
<input checked="" type="checkbox"/>	CWLICENSING[19.108.0017][19R1.2020.04.01]	1	
<input checked="" type="checkbox"/>	CW360SALES[19.207.0026][19R2.2020.08.02]	2	
<input checked="" type="checkbox"/>	CWINBXMGIT[19.110.0013][19R1.2020.11.01]	2	AP101000, SM204002
<input checked="" type="checkbox"/>	CWIVSUBST[19.207.0026][19R2.2020.12.02]	2	IN202500, SO301000
<input type="checkbox"/>	CWLOCKBOXWIKIHELP	2	
<input type="checkbox"/>	CAIntCommCustomizations	3	AR205000, CWAC3010, PM301000, P...
<input type="checkbox"/>	CWACSalesPersonType	3	AR205000, CWAC3010
<input type="checkbox"/>	CWCOLLMGTDEMODATA[20200301]	3	CWCM1000
<input type="checkbox"/>	ADVCOMMDDASHBOARD	15	
<input checked="" type="checkbox"/>	CWCOLLMGT[19.110.0013][19R1.2021.02.01]	16	AR303000, CR302000
<input checked="" type="checkbox"/>	CWADVCOMM[20.101.0032][20R1.2021.02.02]	17	AP301000, AR205000, AR301000, AR...

3. Select the dropdown next to the **Import** button and select **Replace Selected Project Content**. This step should be done for both the updated module and licensing customization project if applicable.

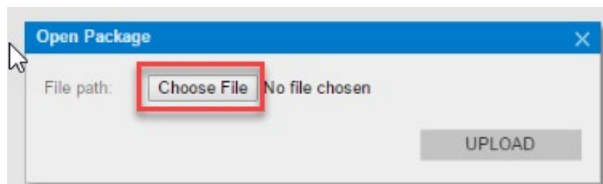


The upgrade requires the Crestwood licensing Customization Package to be published at the same time. To perform the upgrade of Inventory Substitutions & Upsell for Acumatica to the Acumatica instance, the current versions of the customization project zip files, including **CWIVSUBST** and **CWLicensing**, must be re-published into the Acumatica Instance. This can be done by unpublishing the two old customization project files and importing and Publishing the new customization projects using **Import New Project** during the Import Process or by leaving the old customizations published and using the **Replace Highlighted Project Content** during the import process which will overwrite the old packages.

Both files must be published at the same time.



4. In the **Open Package** dialogue box that appears, click the **Choose File** button



5. In the File browser, navigate to the location where the Customization zip file(s) exists. Select the Inventory Substitutions & Upsell zip file (and subsequently the Crestwood Licensing Project if applicable) and click the "Open" button
6. You will be redirected back to the **Open Package** dialogue box and the zip file name should show next to the **Choose File** button. Click the **Upload** button. Once the upload is complete, the Customization Project will show in the **Customizations Project** Screen.

CUSTOMIZATION PUBLISHING

To utilize a customization that has been uploaded, it must be published to the Acumatica instance. If you are updating an existing installation, the site must be republished. It is important to note the following items during the publishing step:



Customizations affect all companies in an Acumatica instance, not just the current company you are logged into.

After the publishing step is performed, the Acumatica Instance will restart effectively logging off all users currently in the system. There is no confirmation prompt for the users to save work. Customizations should only be published during a scheduled maintenance window or when validated that no one is currently logged into Acumatica.

To publish the Acumatica customization project

1. Validate that the project is selected in the customization projects window
2. Click the **Publish** button to begin the publishing validation.



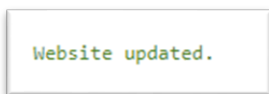
3. Once you click the Publish button, Acumatica will validate that all customizations compile correctly. If this step is performed successfully, you will be prompted with the “Publish” option in the Compilation Window. Click the **publish** button

```

Compilation
Validating the website C:\Program Files (x86)\Acumatica ERP\Customi
IIS APPPOOL\AcumaticaDBLocal
Building directory '\WebSiteValidationDomain\App_Code\'.
Building directory '\WebSiteValidationDomain\App_RuntimeCode\'.
Building directory '\WebSiteValidationDomain\Controls\'.
Building directory '\WebSiteValidationDomain\CstPublished\pages_ar\
Building directory '\WebSiteValidationDomain\MasterPages\'.
Building directory '\WebSiteValidationDomain\Customization\'.
Building directory '\WebSiteValidationDomain\ExternalResource\'.
Building directory '\WebSiteValidationDomain\Mobile\'.
Building directory '\WebSiteValidationDomain\Pages\CW\'.
Building directory '\WebSiteValidationDomain\Pivot\'.
Building directory '\WebSiteValidationDomain\'.
Compiler time, in seconds: 34.4548657

Validation finished successfully.

Publish Warning. Active website users will be logged out.
  
```



4. After publishing is complete, you will see the message that the **Website updated**, and the window can be closed at this point.



Depending on the Acumatica Version and Setup, you may not be required to Press the **Publish** button after Acumatica Validates the Customization Package. Acumatica may complete both steps for you at the same time.

5. Installation of Inventory Substitutions & Upsell for Acumatica is now complete.
6. If you need further assistance, please contact your Partner or Crestwood Associates.

DELETE PROCEDURE

Applicable to embedded solutions and embedded parts of composite solutions.

To entirely remove the Inventory Substitutions & Upsell solution the following steps needed to be taken:

Unpublish solution

1. Log in to the Acumatica instance under the tenant with published Inventory Substitutions & Upsell solution.
2. Navigate to **Customization Projects** Screen (SM204505): **More Items** -> **Customization** -> **Customization Projects**.
3. The **Customization Projects** will display following:

Acumatica		Search...		
Data Views			Customization Projects ☆	
Lockbox			PUBLISH UNPUBLISH ALL IMPORT EXPORT VIEW PUBLISHED VALIDATIONS	
Finance				
Budgeting				
Banking				
Payables				
Receivables				
Collections Manag...				
Sales Orders				
Purchases				
Inventory				
Dashboards				
Commissions				
More Items				
Customization				
		Published	* Project Name	Level Screen Names
		<input type="checkbox"/>	CommissionSummary	
		<input checked="" type="checkbox"/>	CWADVGBTS[20.101.0032][20R1.2021.01.01]	GL202500, GL302010
		<input type="checkbox"/>	CWADVGBTSWIKI2	
		<input type="checkbox"/>	CWCOLLMGTWIKI[19.110.0013][19R1.2019.12.03]	
		<input checked="" type="checkbox"/>	CWLOCKBOX[19.207.0026][19R2.2020.11.02]	
		<input type="checkbox"/>	FSUpdateDates2020R1	
		<input type="checkbox"/>	SalesDemoDashboards2020R1	
		<input type="checkbox"/>	SmartSheet	PM301000
		<input checked="" type="checkbox"/>	CWLICENSING[19.108.0017][19R1.2020.04.01]	1
		<input checked="" type="checkbox"/>	CW360SALES[19.207.0026][19R2.2020.08.02]	2
		<input checked="" type="checkbox"/>	CWINRBMGT[19.110.0013][19R1.2020.11.01]	2 AP101000, SM204002
		<input checked="" type="checkbox"/>	CWIVSUBST[19.207.0026][19R2.2020.12.02]	2 IN202500, SO301000
		<input type="checkbox"/>	CWLOCKBOXWIKIHELP	2
		<input type="checkbox"/>	CAIntCommCustomizations	3 AR205000, CWAC3010, PM301000, P...
		<input type="checkbox"/>	CWACSalesPersonType	3 AR205000, CWAC3010
		<input type="checkbox"/>	CWCOLLMGTDEMODATA[20200301]	3 CWCM1000
		<input type="checkbox"/>	ADVCOMMDDASHBOARD	15
		<input checked="" type="checkbox"/>	CWCOLLMGT[19.110.0013][19R1.2021.02.01]	16 AR303000, CR302000
		<input checked="" type="checkbox"/>	CWADVCOMM[20.101.0032][20R1.2021.02.02]	17 AP301000, AR205000, AR301000, AR...

4. Clear the checkbox for the installed projects:
 - a. CWLICENSING[19.106.0017][19R1.2020.0...]
 - b. CWIVSUBST[19.207.0026][19R2.2020.12...]

5. Click **PUBLISH** on the Tool bar to initiate the process and after the Compilation is complete, then click **Publish** in the Compilation window to finalize publication.
6. Sequentially select and delete (**X** in the toolbar) the rows with the solution packages unpublished in previous step.
7. Click **Save**

Remove the solution items that stored in the database

1. No additional solution items needs to be removed when unpublishing Inventory Substitutions & Upsell

ACUMATICA LICENSE REQUIREMENTS

Acumatica Modules

The Inventory Substitutions & Upsell solution requires following modules to be enabled:

- Financials
- Distribution

Minimal License Tier

The minimal recommend Acumatica ERP license that shall be applied in order for the Inventory Substitutions & Upsell solution to function in alignment with license tier restrictions is:

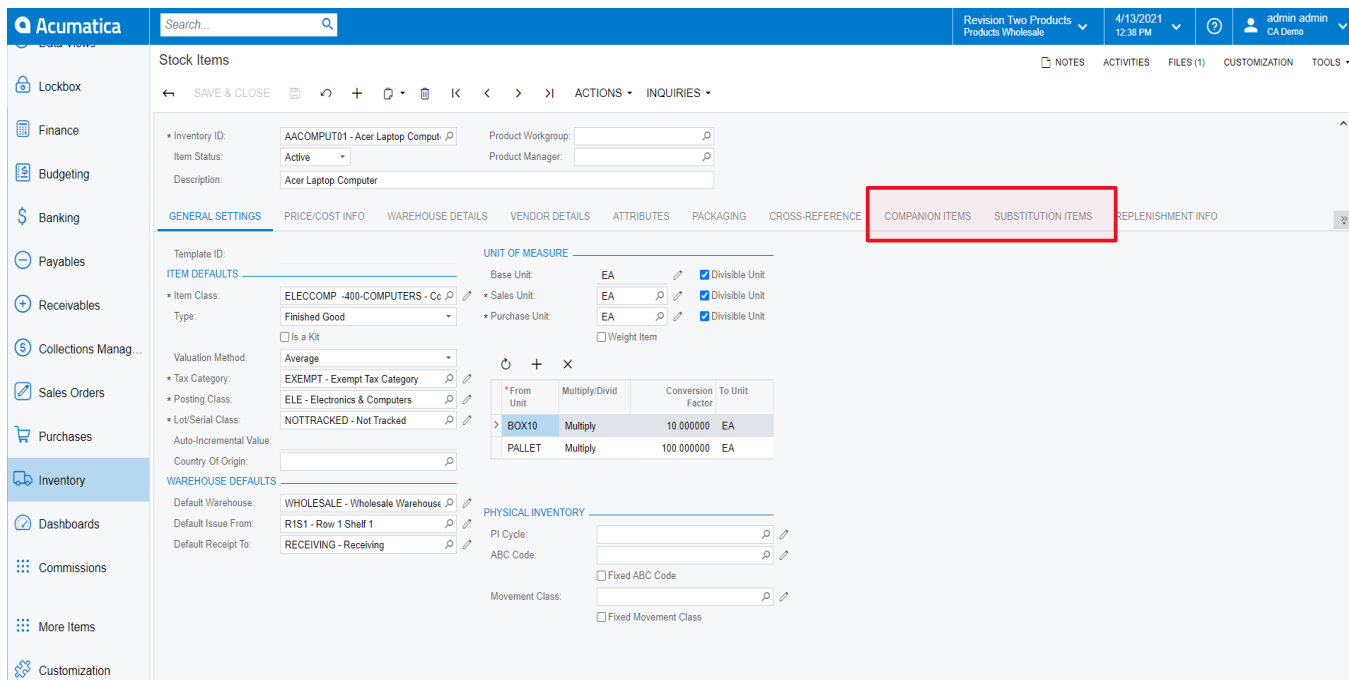
- **S** License Tiers

The above statement is estimated based on average normal use of solution and may vary for an individual setup.

SETUP AND CONFIGURATION – INVENTORY SUBSTITUTIONS & UPSELL

Stock Items: Form ID: (IN.20.25.00)

You use this form to configure the Companion Items and Substitution Items for each Stock Item in the system in order to facilitate the operation of the Inventory Substitutions & Upsell module. Configuration elements defined on this form include Companion Items and Substitution Items. This screen is accessed from the following navigation Location: “Inventory Workspace” -> “Stock Items”

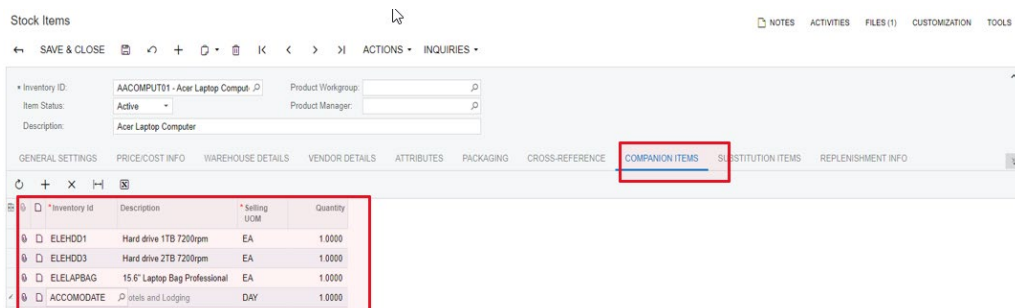


The screenshot shows the 'Stock Items' form in the Acumatica system. The form is for 'AACOMPUT01 - Acer Laptop Comput'. The 'COMPANION ITEMS' and 'SUBSTITUTION ITEMS' tabs are highlighted with a red box. The form includes sections for 'ITEM DEFAULTS', 'UNIT OF MEASURE', 'WAREHOUSE DEFAULTS', and 'PHYSICAL INVENTORY'.

Companion Items

You use this tab on the Stock Items Form to identify additional items that can be sold with the base item defined in the Inventory ID field. One or more additional items can be listed and can consist of both Stock and Non-Stock Items.

In the example below, the first three line items are Stock Items vs ‘ACCOMMODATE’ which is a Non-Stock Item.



The screenshot shows the 'Stock Items' form with the 'COMPANION ITEMS' tab selected. The table below lists the companion items:

Inventory ID	Description	Selling Unit	Quantity
ELEHDD1	Hard drive 1TB 7200rpm	EA	1.0000
ELEHDD3	Hard drive 2TB 7200rpm	EA	1.0000
ELELAPBAG	15.6" Laptop Bag Professional	EA	1.0000
ACCOMMODATE	Hotels and Lodging	DAY	1.0000

Substitution Items

You use this tab on the Stock Items Form to identify additional items that can be sold in place of the base item defined in the Inventory ID field. One or more additional items can be listed and can consist of both Stock and Non-Stock Items.

In the example below, the first two line items are Stock Items vs 'ACCOMMODATE' which is a Non-Stock Item.

Stock Items

NOTES ACTIVITIES FILES (1) CUSTOMIZATION TOOLS

SAVE & CLOSE ACTIONS INQUIRIES

Inventory ID: AACOMPUT01 - Acer Laptop Comput. Product Workgroup:
 Item Status: Active Product Manager:
 Description: Acer Laptop Computer

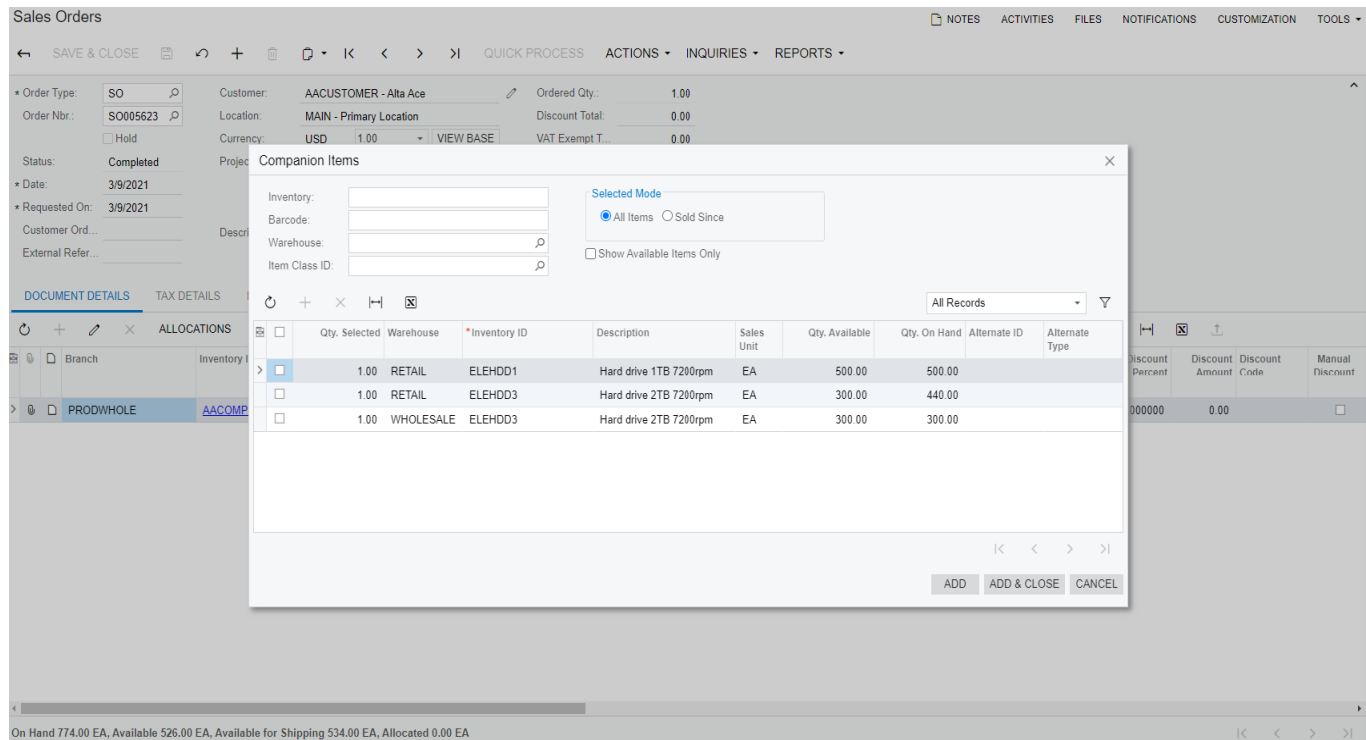
GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE COMPANION ITEMS **SUBSTITUTION ITEMS** REPLENISHMENT INFO

* Inventory Id	Description	* Selling UOM	Quantity
AACOMPUT02	Acer 2 Laptop Computer	EA	1.0000
ELECOMP2	Lenovo laptop computer	EA	1.0000
ACCOMMODATE	Hotels and Lodging	DAY	1.0000

INVENTORY SUBSTITUTIONS & UPSELL FORMS

Companion Items





You use this form to select one or more additional items to sell with base item selected on the Sales Order.



Top Section – Filters available for finding a Companion Item to choose from:

Element	Description
Inventory	Free text field that is used to search Items to find one or more Companion Items.
Barcode	Bar code scanner enabled field that is used to search Items to find one or more Companion Items.
Warehouse	Lookup field to select a particular Warehouse and list the Companion Items that are available in that location.
Inventory Class ID	Lookup field to select a particular Warehouse and list the Companion Items that are available in that location.
Selected Mode	Default value is All Items and when you select Sold Since, a Sold Since date field appears and you can specify a filter date for the date of the last sale.
Show Available Items Only	Checking the box will only show items that are on hand and can be fulfilled.

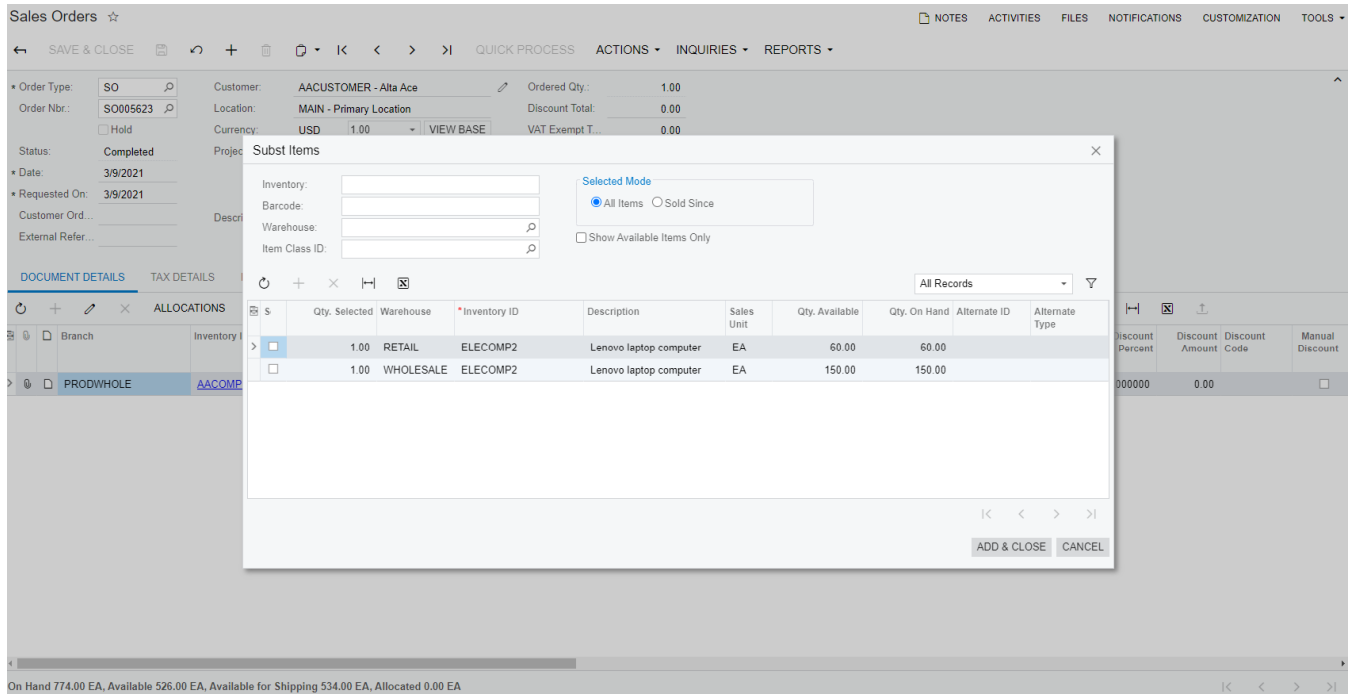
Center Section – List of Companion Items to choose from:

Buttons	Icon	Description
Refresh		Refresh and changes that have not been saved
Add		Add a new item record
Delete		Deletes the selected item record
Export to Excel		Exports the data to an Excel file. For more information, see Integration with Excel in the Acumatica ERP User Guide.

Element	Description
Select	Check the box to add one or more Companion Items to the Sales Order.
Quantity Selected	Shows the quantity of highlighted Companion Item to be added to the Sales Order.
Warehouse	Inventory location where the selected Companion Item will be pulled from.
Inventory ID	Value for the selected Companion Item.
Description	The Description of the Item pulled from the item setup.
Sales Unit	Unit of Measure for the selected Companion Item.
Quantity Available	Number of units of the selected Companion Item in the Warehouse indicated.
Quantity On Hand	Number of units available for sale/fulfillment of the selected Companion Item in the Warehouse indicated.
Alternate ID	Displays a secondary reference for the selected Companion Item.
Alternate Type	Displays a secondary reference type for the selected Companion Item.

Substitution Items

You use this form to select another item to sell in place of the base item selected on the Sales Order.







The screenshot shows the 'Sales Orders' form with a 'Subst Items' dialog box open. The dialog box has fields for 'Inventory', 'Barcode', 'Warehouse', and 'Item Class ID'. It also has a 'Selected Mode' section with radio buttons for 'All Items' (selected) and 'Sold Since'. There is a checkbox for 'Show Available Items Only'. Below these fields is a table with columns: 'Qty. Selected', 'Warehouse', 'Inventory ID', 'Description', 'Sales Unit', 'Qty. Available', 'Qty. On Hand', 'Alternate ID', and 'Alternate Type'. The table shows two rows for 'Lenovo laptop computer' with 'EA' sales units. The first row is for 'RETAIL' with 'ELECOMP2' inventory ID, showing 60.00 available and 60.00 on hand. The second row is for 'WHOLESALE' with 'ELECOMP2' inventory ID, showing 150.00 available and 150.00 on hand. The dialog box has 'ADD & CLOSE' and 'CANCEL' buttons at the bottom right.

Top Section – Filters available for finding a Substitution Item to choose from:

Element	Description
Inventory	Free text field that is used to search Items to find Substitution Items.
Barcode	Bar code scanner enabled field that is used to search Items to find Substitution Items.
Warehouse	Lookup field to select a particular Warehouse and list the Substitution Items that are available in that location.
Inventory Class ID	Lookup field to select a particular Warehouse and list the Substitution Items that are available in that location.
Selected Mode	Default value is All Items and when you select Sold Since, a Sold Since date field appears and you can specify a filter date for the date of the last sale.
Show Available Items Only	Checking the box will only show items that are on hand and can be fulfilled.

Center Section – List of Substitution Items to choose from:

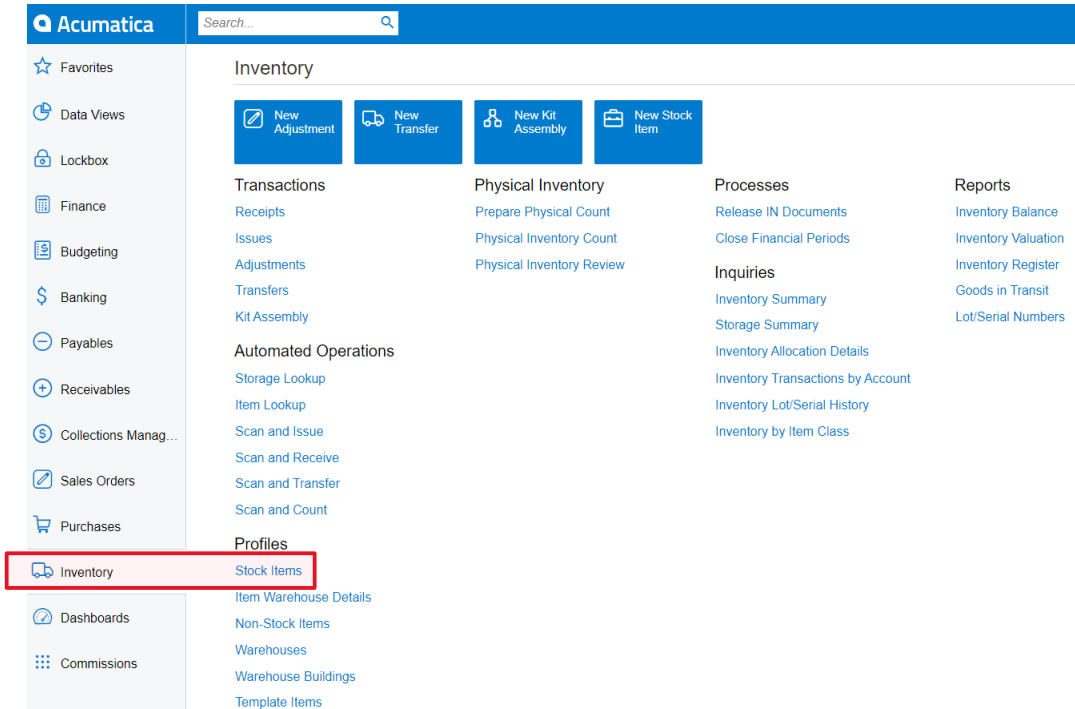
Buttons	Icon	Description
Refresh		Refresh and changes that have not been saved
Add		Add a new item record
Delete		Deletes the selected item record
Export to Excel		Exports the data to an Excel file. For more information, see Integration with Excel in the Acumatica ERP User Guide.

Element	Description
Select	Check the box to add a Substitution Item to the Sales Order.
Quantity Selected	Shows the quantity of highlighted Substitution Item to be added to the Sales Order.
Warehouse	Inventory location where the selected Substitution Item will be pulled from.
Inventory ID	Value for the selected Substitution Item.
Description	The Description of the Item pulled from the item setup.
Sales Unit	Unit of Measure for the selected Substitution Item.
Quantity Available	Number of units of the selected Substitution Item in the Warehouse indicated.
Quantity On Hand	Number of units available for sale/fulfillment of the selected Substitution Item in the Warehouse indicated.
Alternate ID	Displays a secondary reference for the selected Substitution Item.
Alternate Type	Displays a secondary reference type for the selected Substitution Item.

INVENTORY SUBSTITUTIONS & UPSELL WORKFLOW STEPS/EXAMPLE

Start with a Stock Item and assign applicable substitution and companion items to it as follows:

1. Go to the **Inventory** Workspace and select **Stock Items** in the Profile section



2. Select an existing Stock Item or create a new one and setup all relevant parameters








Stock Items ☆




CUSTOMIZATION ▾ TOOLS ▾

Type: All Item Class: All Item Status: All


Inventory ID	Description	Type	Item Class	Default Warehouse	Posting Class	Tax Category	Basic Unit	Default Price	Item Status
AACOMPUT01	Acer Laptop Computer	Finished G...	ELECCOMP -400-COMPUTERS	WHOLESALE	ELE	EXEMPT	EA	500.00	Active
AACOMPUT02	Acer 2 Laptop Computer	Finished G...	ELECCOMP -400-COMPUTERS	WHOLESALE	ELE	EXEMPT	EA	500.00	Active
AALEGO500	Lego 500 piece set	Finished G...	CONSUMER -300-TOYS	WHOLESALE	CON	TAXABLE	EA	100.00	Active
AAMACHINE1	Injection molding machine - serial numbered	Finished G...	INDEQUIP -300-MOLDING	WHOLESALE	IND	EXEMPT	EA	30,000.00	Active
AAPOWERAIID	Poweraid 32 Oz - lot numbered	Finished G...	FOOD -300-PKGFOODS	WHOLESALE	FDI	EXEMPT	EA	1.00	Active
CONAIR1T1	Harvil 4 Foot Air Hockey Table	Finished G...	CONSUMER -300-TOYS	WHOLESALE	CON	TAXABLE	EA	129.50	Active
CONBABY1	South Shore Savannah Changing Table	Finished G...	CONSUMER -100-BABY	WHOLESALE	CON	TAXABLE	EA	152.99	Active
CONBABY2	Little Tikes Bold n Bright Table & Chairs	Finished G...	CONSUMER -100-BABY	WHOLESALE	CON	TAXABLE	EA	54.98	Active
CONBABY3	Grac Pack N Play with Newborn Napperstation	Finished G...	CONSUMER -100-BABY	WHOLESALE	CON	TAXABLE	EA	161.00	Active
CONBALBALL	Gaiam Body Balance Ball Kit	Finished G...	CONSUMER -200-FITNESS	WHOLESALE	CON	TAXABLE	EA	21.98	Active

Stock Items









← SAVE & CLOSE   +      > ACTIONS ▾ INQUIRIES ▾

Inventory ID: AACOMPUT01 - Acer Laptop Comput  Product Workgroup: 
Item Status: Active Product Manager: 
Description: Acer Laptop Computer




GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE COMPANION ITEMS SUBSTITUTION ITEMS REPLENISHMENT INFO

Template ID: 




ITEM DEFAULTS

* Item Class: ELECCOMP -400-COMPUTERS - Cc 
Type: Finished Good 
☐ Is a Kit
Valuation Method: Average 
* Tax Category: EXEMPT - Exempt Tax Category 
* Posting Class: ELE - Electronics & Computers 
* Lot/Serial Class: NOTTRACKED - Not Tracked 
Auto-Incremental Value: 
Country Of Origin: 

WAREHOUSE DEFAULTS




Default Warehouse: WHOLESALE - Wholesale Warehouse 
Default Issue From: R1S1 - Row 1 Shelf 1 
Default Receipt To: RECEIVING - Receiving 

UNIT OF MEASURE

Base Unit: EA  ☒ Divisible Unit
* Sales Unit: EA  ☒ Divisible Unit
* Purchase Unit: EA  ☒ Divisible Unit
☐ Weight Item








* From Unit	Multiply/Divide	Conversion Factor	To Unit
BOX10	Multiply	10.000000	EA
PALLET	Multiply	100.000000	EA




PHYSICAL INVENTORY

PI Cycle: 
ABC Code: 
☐ Fixed ABC Code
Movement Class: 
☐ Fixed Movement Class


3. Select the **Companion Items** tab

Stock Items









← SAVE & CLOSE   +      > ACTIONS ▾ INQUIRIES ▾

Inventory ID: AACOMPUT01 - Acer Laptop Comput  Product Workgroup: 
Item Status: Active Product Manager: 
Description: Acer Laptop Computer




GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE **COMPANION ITEMS** SUBSTITUTION ITEMS REPLENISHMENT INFO

Template ID: 




ITEM DEFAULTS

* Item Class: ELECCOMP -400-COMPUTERS - Cc 
Type: Finished Good 
☐ Is a Kit
Valuation Method: Average 
* Tax Category: EXEMPT - Exempt Tax Category 
* Posting Class: ELE - Electronics & Computers 
* Lot/Serial Class: NOTTRACKED - Not Tracked 
Auto-Incremental Value: 
Country Of Origin: 

WAREHOUSE DEFAULTS




Default Warehouse: WHOLESALE - Wholesale Warehouse 
Default Issue From: R1S1 - Row 1 Shelf 1 
Default Receipt To: RECEIVING - Receiving 

UNIT OF MEASURE

Base Unit: EA  ☒ Divisible Unit
* Sales Unit: EA  ☒ Divisible Unit
* Purchase Unit: EA  ☒ Divisible Unit
☐ Weight Item

* From Unit	Multiply/Divide	Conversion Factor	To Unit
BOX10	Multiply	10.000000	EA
PALLET	Multiply	100.000000	EA

PHYSICAL INVENTORY

PI Cycle: 
ABC Code: 
☐ Fixed ABC Code
Movement Class: 
☐ Fixed Movement Class

4. Add one or more **Companion Items** in the grid section of the screen. **Companion Items** can consist of Stock and Non-Stock Items.

Stock Items

NOTES ACTIVITIES FILES (1)

SAVE & CLOSE

* Inventory ID: AACOMPUT01 - Acer Laptop Comput...
Item Status: Active
Description: Acer Laptop Computer

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE **COMPANION ITEMS** SUBSTITUTION ITEMS REPLENISHMENT INFO

Inventory Id	Description	Selling UOM	Quantity
ELEHDD1	Hard drive 1TB 7200rpm	EA	1.0000
ELEHDD3	Hard drive 2TB 7200rpm	EA	1.0000
ELELAPBAG	15.6" Laptop Bag Professional	EA	1.0000

5. Add one or more **Substitution Items** in the grid section of the screen. **Substitution Items** can consist of Stock and Non-Stock Items.

Stock Items

NOTES ACTIVITIES FILES (1)

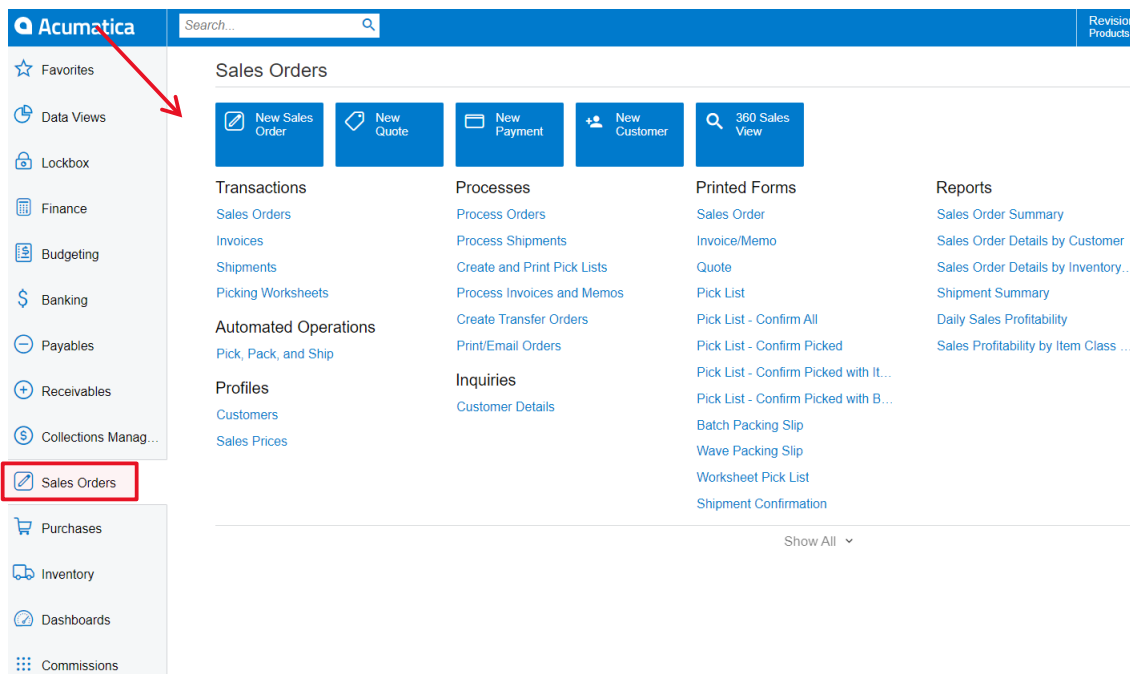
SAVE & CLOSE

* Inventory ID: AACOMPUT01 - Acer Laptop Comput...
Item Status: Active
Description: Acer Laptop Computer

GENERAL SETTINGS PRICE/COST INFO WAREHOUSE DETAILS VENDOR DETAILS ATTRIBUTES PACKAGING CROSS-REFERENCE COMPANION ITEMS **SUBSTITUTION ITEMS** REPLENISHMENT INFO

Inventory Id	Description	Selling UOM	Quantity
AACOMPUT02	Acer 2 Laptop Computer	EA	1.0000
ELECOMP2	Lenovo laptop computer	EA	1.0000
ACCOMODATE	Hotels and Lodging	DAY	0.0000

6. Create a new Sales Order from the Sales Order Workspace.



7. Add an item to the **Sales Order**.

Sales Orders

NOTES ACTIVITIES FILES NOTIFICATIONS CUSTOMIZATION TOOLS

SAVE & CLOSE QUICK PROCESS ACTIONS INQUIRIES REPORTS

Order Type: SO Customer: ABARTENDE - USA Bartending Schor Ordered Qty.: 1.00
Order Nbr: <NEW> Location: MAIN - Primary Location Discount Total: 0.00
Currency: USD 1.00 VIEW BASE VAT Exempt T...: 0.00
Status: Open Project: X - Non-Project Code VAT Taxable T...: 0.00
Date: 4/14/2021 Tax Total: 0.00
Requested On: 4/14/2021 Order Total: 510.00
Customer Ord...: Description:
External Refer...:

DOCUMENT DETAILS TAX DETAILS FINANCIAL SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS DISCOUNT DETAILS SHIPMENTS PAYMENTS TOTALS

ALLOCATIONS ADD INVOICE ADD STOCK ITEM COMMISSION SPLIT ADD COMPANION ITEMS SUBSTITUTE ITEM ADD MATRIX ITEM PO LINK INVENTORY SUMMARY

Branch	Inventory ID	Warehouse	Line Description	Quantity	UON	Project Task	Require Appointment	Qty. On Shipment	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount
PRODWHOLE	AACOMPUT01	WHOLESALE	Acer Laptop Computer	1.00	EA			0.00	1.00	500.00	0.000000	0.00		

On Hand 774.00 EA, Available 526.00 EA, Available for Shipping 534.00 EA, Allocated 0.00 EA

8. Select **Add Companion Items** to add one or more additional items to the **Sales Order**. Use the filters in the header section of the **Companion Items** form to find particular items.

Sales Orders

NOTES ACTIVITIES FILES NOTIFICATIONS CUSTOMIZATION TOOLS

SAVE & CLOSE QUICK PROCESS ACTIONS INQUIRIES REPORTS

Order Type: SO Customer: ABARTENDE - USA Bartending Schor Ordered Qty.: 1.00
Order Nbr: <NEW> Location: MAIN - Primary Location Discount Total: 0.00
Currency: USD 1.00 VIEW BASE VAT Exempt T...: 0.00
Status: Open Project: X - Non-Project Code VAT Taxable T...: 0.00
Date: 4/14/2021 Tax Total: 0.00
Requested On: 4/14/2021 Order Total: 510.00
Customer Ord...: Description:
External Refer...:

DOCUMENT DETAILS TAX DETAILS FINANCIAL SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS DISCOUNT DETAILS SHIPMENTS PAYMENTS TOTALS

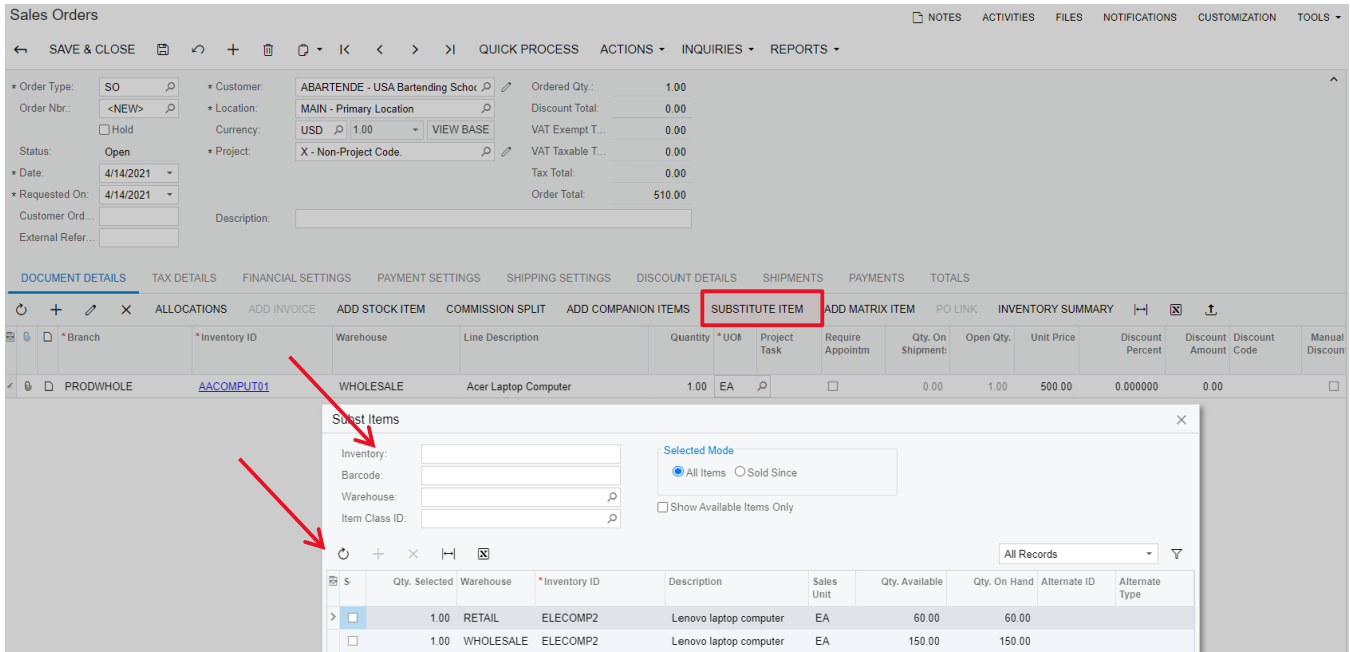
ALLOCATIONS ADD INVOICE ADD STOCK ITEM COMMISSION SPLIT **ADD COMPANION ITEMS** SUBSTITUTE ITEM ADD MATRIX ITEM PO LINK INVENTORY SUMMARY

Companion Items

Inventory: Barcode: Warehouse: Item Class ID: Selected Mode: All Items Sold Since Show Available Items Only

Qty. Selected	Warehouse	Inventory ID	Description	Sales Unit	Qty. Available	Qty. On Hand	Alternate ID	Alternate Type
1.00	RETAIL	ELEHDD1	Hard drive 1TB 7200rpm	EA	500.00	500.00		
1.00	RETAIL	ELEHDD3	Hard drive 2TB 7200rpm	EA	300.00	440.00		
1.00	WHOLESALE	ELEHDD3	Hard drive 2TB 7200rpm	EA	300.00	300.00		

9. If the selected base item is not able to be fulfilled, the user can select **Substitute Item** to find a different item to replace the base item originally selected on the **Sales Order**. Use the filters in the header section of the **Substitute Items** form to find particular items.



The screenshot shows the 'Sales Orders' form with the 'SUBSTITUTE ITEM' button highlighted in red. A red arrow points from this button to the 'Subst Items' dialog box. Another red arrow points from the 'Inventory ID' field in the 'Subst Items' dialog box to the 'Inventory ID' field in the main form.

Sales Orders

Order Type: SO Order Nbr: <NEW> Status: Open Date: 4/14/2021 Requested On: 4/14/2021 Customer Ord... External Refer...

Customer: ABARTENDE - USA Bartending Schor Location: MAIN - Primary Location Currency: USD 1.00 Project: X - Non-Project Code Description:

Ordered Qty: 1.00 Discount Total: 0.00 VAT Exempt T... 0.00 VAT Taxable T... 0.00 Tax Total: 0.00 Order Total: 510.00

DOCUMENT DETAILS TAX DETAILS FINANCIAL SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS DISCOUNT DETAILS SHIPMENTS PAYMENTS TOTALS

ALLOCATIONS ADD INVOICE ADD STOCK ITEM COMMISSION SPLIT ADD COMPANION ITEMS **SUBSTITUTE ITEM** ADD MATRIX ITEM PO LINK INVENTORY SUMMARY

Branch	Inventory ID	Warehouse	Line Description	Quantity	UOM	Project Task	Require Appointm	Qty. On Shipment	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount
PRODWHOLE	AACOMPUT01	WHOLESALE	Acer Laptop Computer	1.00	EA			0.00	1.00	500.00	0.000000	0.00		

Subst Items

Inventory: Barcode: Warehouse: Item Class ID:

Selected Mode: ☒ All Items ☐ Sold Since ☐ Show Available Items Only

Qty. Selected	Warehouse	Inventory ID	Description	Sales Unit	Qty. Available	Qty. On Hand	Alternate ID	Alternate Type
1.00	RETAIL	ELECOMP2	Lenovo laptop computer	EA	60.00	60.00		
1.00	WHOLESALE	ELECOMP2	Lenovo laptop computer	EA	150.00	150.00		

10. Make any other required changes to the **Sales Order** and process it per normal procedures for your organization.