

Substitute Item on Sales Documents

You can substitute an item on sales documents

You first need to set it up [here](#)

Once it has been set up

Add the sales document as per normal, then a pop-up will appear confirming that the item has a replacement and asking if you want to change the item to a replacement.

You need to click Yes to change to a replacement or No to leave it as it is

Edit Sales Order Item

QTY: 10

Sale Order Item

Inventory Overview
View Image
Task link
Functions
Currency: R - Rand South Africa

Details
Notes
UOM
Specs
Build Kit

Stock Item:
51 - Ladies Sunglass

Description:
Ladies Sunglass

Item Group:

Order Qty:
1
Reserve Qty:
0

Confirmation Type:
Confirmation
Warehouse:
MAST - Master Warehouse

Pricing Structure:
Default

Selling Ex VAT:
2

Selling Inc VAT:
2

Sub Total Selling:
20.0

VAT Value:
3.00

Total Selling:
23.00

Line Reference:

Sequence No.:
1.00

Cost Per Unit:
588.00

Profit Cost / Unit:
(568.00)

Total Cost:
588.00

Show In Print:
Flag for Report:
Weight Per Unit:
0.00

BOM Selection:
Total Weight:
0.00

Division:
Sales Rep:
Company

Region:
Project:

Save & New
Save & Close
Close

Replacement Item

This item has a replacement
Change to new replacement item?

Yes
No

Once complete click save and new to add a new item line or click save and close.

Should you have saved the item as it is and later on realize that you don't have enough of the initial item and want to change to a replacement item click on the change icon below:

Edit Sales Order Item
QTY: 10

Sale Order Item

Inventory Overview
 View Image
 Task link
 Functions ▾
Currency: R - Rand South Africa

Details
Notes
UOM
Specs
Build Kit

Stock Item:
51 - Ladies Sunglass

Description:
Ladies Sunglass

Item Group:

Order Qty:
1

Reserve Qty:
0

Confirmation Type:
Confirmation

Warehouse:
MAST - Master Warehouse

Pricing Structure:
Default

UOM Type:

Selling Ex VAT:
20

UOM:

Selling Inc VAT:
☐ 23.00

Line Discount:
0

Promotion:
☐

Sub Total Selling:
20.00

VAT Type:
01 Invoice VAT:15

VAT Value:
3.00

Mark-up %:
-96.60

Total Selling:
23.00

Cost Per Unit:
588.00

Line Reference:

Profit Cost / Unit:
-568.00

Sequence No.:
1.00

Total Cost:
588.00

Show In Print:
☒

Flag for Report:
☐

Weight Per Unit:
0.00

BOM Selection:

Total Weight:
0.00

Division:

Sales Rep:
Company

Region:

Project:

Save & New
 Save & Close
 Close

The screen below will appear and you can select the replacement product

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Select Replacement Item

⚙️ ?

🔍 Search

🔴 Replacement Item

🔴 Linked Items

⏪ ⏩ Page 1 of 1 ⏪ ⏩ ↺ Edit Item Remove Paging: ☐ Displaying 1 - 1 of 1

#	Code	Description ▲	Category	UOM	Selling Price
1	4260Q-0003045...	WAVES SUNGL...	Stock		60.00

Select

Close

Click select then it will take you back to the item line screen.

You can add notes, change warehouse if required and update quantity as per normal

Then click save and new to add another item line or save and close when completed

Then action the sales document