Booking Product Substitution Utility

Last Modified on 03/24/2025 2:24 pm CDT

Substitute Products on unpaid Bookings at *Accounting / Utilities / Booking Product Substitution*. Note that Products must have like Units of Measure, and there are limitations as to which types of Bookings can be updated.
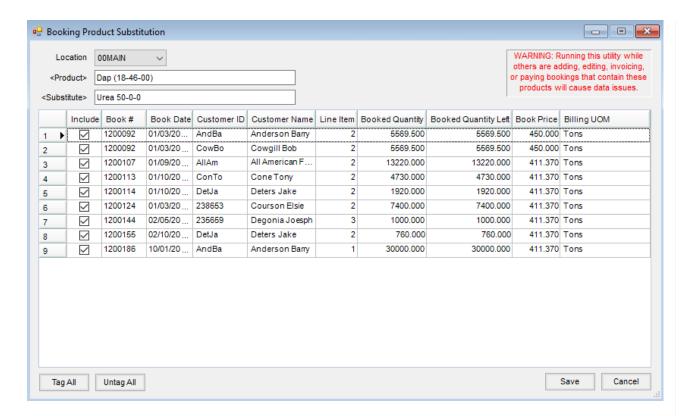
> **Note:** Running this utility while others are adding, editing, invoicing, or paying Bookings containing these Products will cause data issues.

Only certain Bookings are eligible for substitutions:

- Bookings not marked as invoiced, voided, or deleted
- Split Bookings if neither Customer's portion has been invoiced

> It is important to note:
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> - Partial quantities cannot be substituted. The quantity to be substituted is all or none for a line item.
> - If the original Product is on a Booking more than once (multiple lines for the same Product), the line added for the new Product will not be a sum of the original lines. Multiple lines will be added for the new Product.
> - Bookings associated with Grower Orders and Bookings with an associated Sales Contract are not eligible for substitutions using this utility.

1. Choose the appropriate *Location* from the drop-down.

2. Double-click in the *<Product>* field to choose the original Product needing substituted. Unpaid Bookings containing that Product will display in the grid.

3. Double-click in the *<Substitute>* field to select the new Product replacing the original.

4. Select the *Include* checkbox for each Booking to make this substitution, or choose **Tag All**/**Untag All** to select/deselect all Bookings listed.

5. Choose **Save** to update included Bookings.