Working with Special Orders

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Special order (SO) items are line item codes (LICs) that you do *not* regularly keep in stock. These items are typically only purchased as needed for a specific order. You might also make a special purchase to take advantage of certain reduced costs or shipping, or there may be value-added services that you provide on the product before shipping it to the customer. For an example of how this feature can help your team, read our <u>feature highlight</u>

(https://www.aacesoft.com/resources/drop-shipping-and-special-orders-made-easy-with-aace).

Items you assemble at your facilities are rarely marked as SO items. Therefore, screen layouts for Assembly Items and Inventoried Assembly Items do *not* usually include the SO flag.

When you configure an LIC record as a special order item, it affects multiple aACE processes:

- The LIC is *removed* from the <u>automatic inventory replenishment processes</u>
 (http://aace5.knowledgeowl.com/help/configuring-inventory-replenishment-for-purchased-items) aACE does not manage
 inventory levels for special order items, so the replenishment fields become inactive for
 the item.
- The LIC cannot be flagged as a <u>drop ship (http://aace5.knowledgeowl.com/help/overview-of-drop-shipping)</u> (DS) item These two options are mutually exclusive. If the SO flag is already marked when you mark the DS flag, the SO flag will be cleared automatically, and vice versa.

In addition, when you include an SO item on an order, it affects order functionality (depending on your system preferences):

- The SO flag for the item on the sales order screen is flagged automatically.
- When you open the order, aACE <u>automatically generates a purchase order</u> (<u>https://aace5.knowledgeowl.com/help/order-procurement-automation</u>) (PO) for procurement.
- aACE cannot auto-generate an outgoing shipment that includes the SO item until after the item is received in an incoming shipment.
- When the SO item is received, aACE automatically <u>generates a notice</u> (https://aace5.knowledgeowl.com/help/working-with-notices) for the associated team members to inspect the product and generates the necessary shipping and invoicing records.

For additional flexibility, you can specify that regular LICs on a sales order should be handled as special order items. This can be useful when temporary business factors make the item's quantity larger than normal or the cost of the goods/shipping lower than usual. Marking the SO flag for a product links that specific inventory to that specific order; this enables aACE to automatically generate a purchase order to the SO item vendor when the sales order is opened.

Configuring a Line Item Code as Special Order

Navigate to the LIC detail view's Item Info section, then mark the flag for Special Order:

Record: 10 of 4		T 1 4				New 🖶 Edit 🖋 Delete 🗱 Print 🖨 Actions 🛪
Line Item Code: Tech-001a					Electronic Whiteboard	ACTIVE
Item Details						Notices 🕴 🛛 Emails 🞽 🛛 Docs 🥝
eneral Info					Pictures	Order Item Notes
уре	Est Unit Cost	Rate Type	Rate Value	VDS	+ Photo 1 +	Photo 2
echnology	4,000.00	Mark Up %	25.00%	V		
Price	MSRP	Comm Type	Comm Value	VCS		
5,000.00		Fixed Amount	5.00	v		
evenue Account > 001 Uncategorize Appartment > ACME, Inc. (AI) Options	ed Sales 🔍		ales Offices	ď		Barcoto Separ CODE50031 SKJ 13584695
🝳 Line Item (escription			Quantity 🔒 Alternate Upgrade Notes	×
1 > Tech-001	Q EI	ectronic Whitebo	ard, freestand	ing	0	
Enforce rate ca	rd billing. Prev	vents users from changed invoice items to A	inging the price waTax. Optional	at entr code:	y. Auto-update cos Updates the estim	er discount. Prevents the customer discount from being applied to this code at entry. est rate based on purchasing activity within this last number of days: nated cost rate to average of recent purchases. en ordered. Sends "Line Item Code Ordered" notice when an order or PO is opened.

Flagging an Item on a Sales Order as Special Order

Navigate to the sales order's Order Items section, then mark the flag for SO:

Order: 50069	Co	gnitio					01/09	/19	PE		G 🤇
Sales Order Mana		Costs & Appr	ovals					Notices 🔒	Emails	- 1	Docs (
Bill To		=" *	Ship To		="	*	• Activities 8	k Comments			
Customer (Bill To) >	Contact >			Bill To 🗙 Ship To Contact :							
Cognitio	Samuel Johnson	Q,	Cognitio	Samuel Johnso							
A/R Balance > Credit Available	Rate Card >		Delivery Type	Courier Service							
0.00		Q,	Ship Together								
Sales Rep > Customer PO #	Billing Terms	Disc %	Courier Account #	Shipping Terms	FOB						
CN Q	Net 30	5%									
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After you flag an item as special order, you can also use additional functionality at the Management tab's Procurement sub-tab. The section-level and line-level Actions menu provide options for creating the needed POs.

Special Orders in Action

To see an example of how a special order moves through aACE, check out <u>the feature</u> <u>highlight on our website</u> (https://www.aacesoft.com/resources/drop-shipping-and-special-orders-made-easy-with-aace).