

Configuring Automation Schedules

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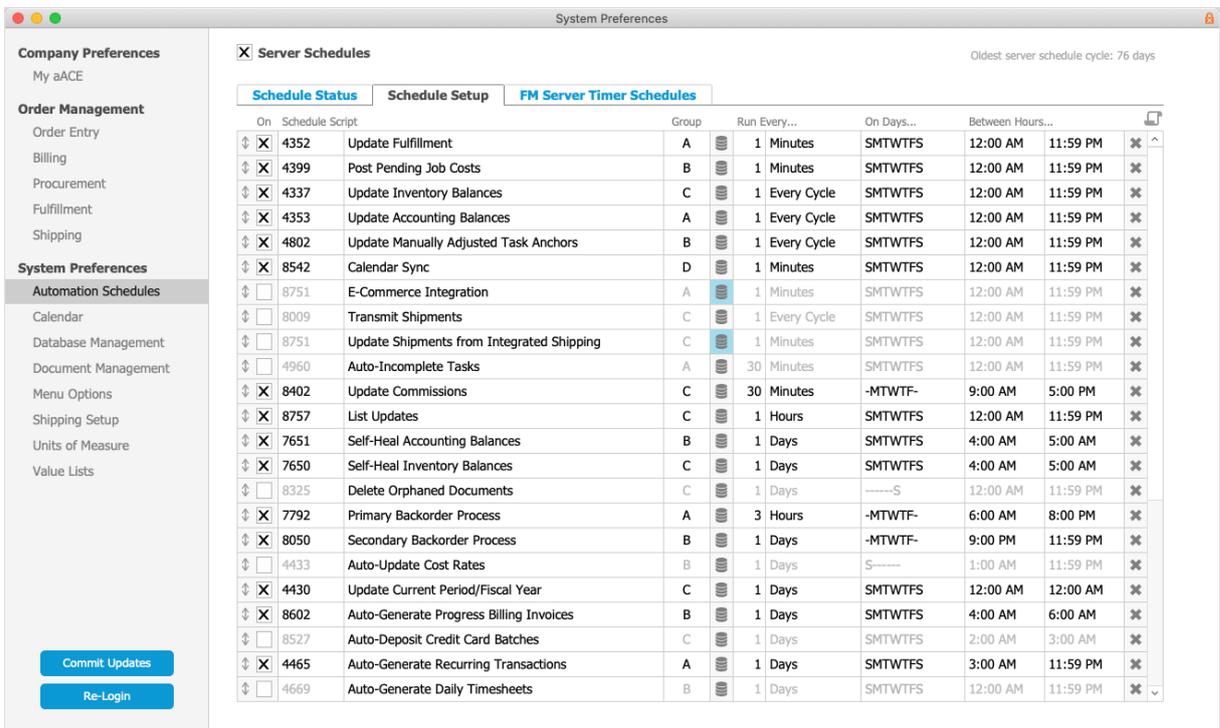
This guide explains how to set up automated scripts to streamline workflows. It is intended for system administrators.

In aACE, your system administrator can set up custom automation schedules that run in the background. These schedules can automatically update your system in various ways, such as checking for incoming email, updating accounting balances, posting job costs, updating inventory and pending purchase orders, and sending system notices.

The out-of-the-box aACE 5 automation schedules cover the high-priority functionality for most organizations. The best timing for running these scripts can vary. Your system administrator can easily customize the frequency of an automation schedule.

Changing the Frequency of an Automation Schedule

1. Navigate to **Menu > System Admin > Preferences > Automation Schedules**.
2. From the Schedule Setup tab, locate the desired script.



3. Update the frequency, using the following settings:
 - List Adjustment Arrows (↕) – Move an entry higher or lower in the list. Scripts placed higher run before other scripts in the same group scheduled for the same

time.

- Group – Organize scripts together in various ways (e.g. grouped by related functionality, grouped to ensure that processes which need to run quickly are not kept waiting on processes that take a long time to complete, etc). Timing for each group is handled on the FM Server Timer Schedules tab (see below).
- Script Parameter () – Enter FileMaker coding to specify which records should be affected when the script runs. For example, the script to re-authorize credit cards could include a parameter of (DaysOld=40), identifying which credit card records should be included when the script runs.
- Run Every... – Enter the quantity and the time measurement when the script should run. You can also assign a common monthly timeframe for it to run (e.g. Last Day of Month).
- On Days... – Click the field and mark the flags for the days of the week when the script should run.
- Between Hours... – Enter the hours when the script should run.

4. Click **Commit Updates**.

For specific questions about timing your automation schedules, contact aACE support or your aACE partner. They can guide you through the configuration process for your system.

Manually Running a Schedule Script

On the Schedule Status tab, each automation schedule includes a Run link at the right. Clicking this link displays a dialog box asking whether to run the script locally or on the server. In nearly all cases, running the script on the server is more appropriate.

Activating New Schedule Scripts

If needed, your system administrator can activate additional FileMaker scripts. For custom scripts, contact aACE support or your aACE partner.

1. Navigate to **Menu > System Admin > Preferences > Automation Schedules**.
2. Click the **Schedule Setup** tab, then scroll down to the first blank row, click the **Schedule Script** field, and select the desired script.

System Preferences

Automation Schedules

Server Schedules Oldest server schedule cycle: 5 minutes

On	Schedule Script	Group	Run Every...	On Days...	Between Hours...
<input checked="" type="checkbox"/>	7650 Self-Heal Inventory Balances	C	1 Days	SMTWTFS	4:00 AM 5:00 AM
<input type="checkbox"/>	8325 Delete Orphaned Documents	C	1 Days	-----S	12:00 AM 11:59 PM
<input type="checkbox"/>	7792 Primary Backorder Process	A	1 Days	-MTWTF-	9:00 PM 11:59 PM
<input type="checkbox"/>	8050 Secondary Backorder Process	B	1 Days	SMTWTFS	9:00 PM 11:59 PM
<input type="checkbox"/>	4433 Auto-Update Cost Rates	B	1 Days	S-----	1:00 AM 11:59 PM
<input checked="" type="checkbox"/>	4430 Update Current Period/Fiscal Year	C	1 Days	SMTWTFS	12:00 AM 12:00 AM
<input checked="" type="checkbox"/>	8602 Auto-Generate Progress Billing Invoices	B	1 Days	SMTWTFS	4:00 AM 6:00 AM
<input type="checkbox"/>	4465 Auto-Generate Recurring Transactions	A	1 Days	SMTWTFS	3:00 AM 11:59 PM
<input type="checkbox"/>	4669 Auto-Generate Daily Timesheets	B	1 Days	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Archive Data	C	1 Days	-MTWTF-	12:00 AM 11:59 PM
<input type="checkbox"/>	Auto-Deposit Credit Card Batches	A	30 Minutes	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Auto-Generate Daily Timesheets	C	1 Days	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Auto-Generate Progress Billing Invoices	B	1 Days	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Auto-Generate Recurring Transactions	C	1 Days	S-----	1:00 AM 11:59 PM
<input type="checkbox"/>	Auto-Incomplete Tasks	C	1 Days	SMTWTFS	5:00 AM 7:00 AM
<input type="checkbox"/>	Auto-Reverse GJ Entries	A	1 Days	S-----	6:00 PM 11:59 PM
<input type="checkbox"/>	Auto-Update Cost Rates	B	Last Day of	SMTWTFS	10:00 PM 11:59 PM
<input type="checkbox"/>	Calendar Sync	A	Last Day of	SMTWTFS	12:00 AM 5:00 AM
<input type="checkbox"/>	Credit Card Expiration Notifications	C	1 Minutes	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Delete Orphaned Documents	B	30 Days	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Download Web Timesheets	B	1 Minutes	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	eCommerce Integration	B	30 Days	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Generate COGS Reconciliation	B	1 Minutes	SMTWTFS	12:00 AM 11:59 PM
<input checked="" type="checkbox"/>	Generate Inventory Replenishment	B	1 Every Cycle	SMTWTFS	12:00 AM 11:59 PM
<input type="checkbox"/>	Mobile Integration	C	1 Minutes	SMTWTFS	12:00 AM 11:59 PM

3. Specify the frequency for the script (see above).
4. Mark the **ON** flag.
5. Click **Commit Updates**.