

Overview of Order Setup

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Orders typically deal with four different record types. Line item code and rate card records each store information about the items and services you buy and sell. Template and group task records store pre-defined details and workflows.

Line Item Codes

Line item codes (LICs) are the items and services you buy and sell. aACE includes seven LIC record types. Each has specific characteristics, attributes, and functions within the system.

1. Items – Product you buy or sell (but not inventoried items or assembly items)
2. Inventoried Item – Product you keep in stock and track quantities
3. Assembly Item – Product that requires production
4. Inventoried Assembly Item – Product that requires production and is then kept in stock
5. Time – Activities your team works on (ex: design services, technical support, and product assembly time)
6. Expense – Items you purchase and consume (ex: office supplies, out-of-pocket expenses like travel or taxi fare), and also for things you purchase and pass the cost on to your customer (ex: job supplies or special services)
7. Other – Miscellaneous uses such as line item adjustments, order deposits, line item discounts, tax adjustments, etc.

Every source of revenue or cost throughout the system is assigned to a line item code. Each line item code record, in turn, is associated with both a revenue-side and cost-side general ledger accounting code. This allows users to assign the same line item code (ex: “Printing”) to both a Purchase and an Invoice. All the necessary accounting logic is completely transparent.

Learn more about [line item codes](http://aace5.knowledgeowl.com/help/overview-of-line-item-codes) (<http://aace5.knowledgeowl.com/help/overview-of-line-item-codes>).

Rate Cards

The [Rate Cards](http://aace5.knowledgeowl.com/help/115000654171-rate-cards) (<http://aace5.knowledgeowl.com/help/115000654171-rate-cards>) module stores special pricing and commissions associated with LICs. You can create custom rate cards to link to specific customers or you can use them for special pricing situations.

Templates

The Templates module stores templates for several record types: orders, purchase orders, shipments, and campaigns. It offers management the opportunity to standardize activities and better control the wording viewed by clients. As an efficiency gain, rather than re-entering similar data over and over, you can simply select a template to start these records.

Task Groups

The Task Groups module is used to create workflows which can then be assigned to jobs and line item codes. These process templates help automate the setup of workflows around assemblies and other multi-task fulfillments.
