Order Entry Preferences

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> This guide explains settings you can configure to optimize your order entry workflows. It is intended for system administrators.

To manage these settings, navigate from Main Menu > System Admin > Preferences > Order Entry.

1. Sales Order Fields

This section controls the global order interfaces, establishing the baseline for general user experience in your aACE system. (Note: Settings you specify for a particular user group (https://aace5.knowledgeowl.com/help/overview-of-user-groups) will override these general defaults.) This section also contains preference settings for how orders interact with other modules in the system.

- Pending Order Label — Customizes the title for new orders, the initial tracking status for these records, and the label used in the Leads module. Click Edit to enter other terms that are best suited for your organization.
- Default Order Type — Specifies what type of record to create for each new order. If various types of orders are possible, use the setting for "Allow multiple record types".
- Sales Order Layout — Drop-down list where you specify the most useful order screen layout for new sales orders: custom, price-based, margin-based, commodity, and

international.

- Production Order Layout — Drop-down list where you specify the most useful order screen layout for new production orders: custom, default (assumes building and shipping a product), service, and international.
- Default Delivery Type — Drop-down list where you specify the most useful shipping arrangement: pick up, ship together (shipping will wait until all ordered items are ready), ship separately, and not applicable.
- Deliv Length — Specifies the global default for how many business days a delivery can take. This setting can be overridden by settings in task groups and other areas.
- Free Shipping Type — Drop-down list where you specify which order details will trigger free shipping: units, value, and net or gross weight.
- Free Shipping — Specifies the quantity of units, dollars, or weight that will automatically force the shipping value on an order to zero.
- Allocate Shipping Cost By — Drop-down list where you specify how a shipping cost will be apportioned across multiple orders that are gathered into a single shipment: quantity, value, and net or gross weight. This can help your organization track profitability on a per-order basis.

2. Sales Order Flags

These additional flags help you customize your system behaviors to best support user productivity and company policy. Noteworthy details include:

- Allow multiple order record types
- Prompt to open order on save — Even if this flag is marked, if there are no line items on the order, the system will *not* display this prompt. Clearing this flag is helpful for organizations that require a response from the customer before opening the order.
- Open / Closed by default — Removes pending or voided orders from search results on the Orders module list view. Note: The initial display of the Orders module always presents all current user's orders, in all statuses. Marking this flag is helpful for organizations that handle pending orders as leads.
- Enable backorder management (http://aace5.knowledgeowl.com/help/understanding-backorder-management)
- Prevent shipping override by default — Enforces the shipping cost specified on the order, ignoring other automated system logic about shipping.
- Send order manager a notification when payment is received — Marking this flag is helpful for organizations that require a deposit before starting work on an order.
- Segregate line item codes by office
- Management Validations — Sets constraints that prevent an order from being closed.

3. Leads Flags

These additional flags help streamline and govern your system if your organization relies on lead records prior to creating orders.