Automation Settings for Shipping

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This guide explains how to configure settings that streamline your shipping workflows. It is intended for system administrators.

System administrators can configure three primary settings that help automate shippingrelated data entry and workflows:

- Auto-Generate Shipments
- Enable Backorder Management
- Default Delivery Type

In addition to these system preferences, to access automated shipping features, your line item codes (LICs) must each have the Enable Shipping checkbox selected.

Auto-Generate Shipments

This preference tells aACE to automatically create shipments for items when an order is opened. It is only applicable in systems where inventory processes are enabled.

- 1. Navigate from Main Menu > System Admin > Preferences > Shipping.
- 2. In the Order Shipments section, mark the flag to Auto-generate shipments.



Related Automation Settings

Generate Shipments for Pick-Up Orders

Pick-up orders do not need to be shipped. However, for your record-keeping purposes, you can have aACE generate a shipment to help manage your pick-and-pack processes.

Append Auto-Generated Items to Pending Shipments by Location

With this preference flagged, when aACE sets up the shipment for one order, it can add LICs from other orders for that customer and location. If you leave these additional LICs on the shipment and mark it as Shipped, aACE will update those other orders accordingly.

Returns Reduce Order Item Quantity

The default assumption in aACE is that goods returned from your customers will be replaced. However, if your business processes assume that returned goods will *not* be replaced, you can mark this flag. aACE will then reduce the ordered quantity rather than generate a replacement shipment.

Enable Backorder Management

This preference tells aACE to track partial shipments as backorders.

For example, if an order is placed for 10 items, but only 5 are shipped, users will be asked to mark the applicable items as backordered. Then when an incoming shipment with backordered items is received, an outgoing shipment will automatically be generated for those items, in the quantities available.

- 1. Navigate to Menu > System Admin > Preferences > Order Entry.
- 2. In the Sales Orders section, mark the flag to Enable backorder management

•••			System Preference	es		
Company Preferences	Sales Orders					
My aACE	A Pending Order is a(an)	Default Order Rec Type	Sales Order Layout	Production Order Layout	Default Delivery Type	Deliv Length
Order Management	Quote	Sales	Custom	Default	Ship Together	2 Business days
Order Entry	Free Shipping Type	Free Shipping	Allocate Shipping Cost B	У		
Billing	Value (Dollars)	1,000.00	Value			
Procurement	X Allow multiple order	record types. Select this if a	users will need the ability t	o select "Sales", "Production",	or custom order types when	creating new orders.
Fulfillment	X Prompt to open orde	r on save. Select this if orde	rs are typically opened imr	nediately after entry.		
Shipping	Open / Closed (O/C)	by default. Select this to ha	we pending and voided or	ders hidden from search results	s by default.	
	Enable back order ma Prevent chipping over	mide (PSO) by default. Se	lect this if you typically cha	arge fixed amounts for shipping	1.	
System Preferences	Send order manager	a notification when paym	ent is received.			
Automation Schedules	Segregate line item of	odes by office. Select this t	o yield an office-specific lis	st of line item codes during ord	er entry.	
Calendar	Management Validation	5				
Database Management	Invoice amount must match order.					
Document Management	Shipment quantity must match order. Order balance must be zero.					
Menu Options	Do not ship more than ordered.					
Shipping Setup						
Units of Measure	Leads					
Value Lists	Always generate a project when a lead is won.					
	Validations					
	Campaign is required.					
	Type is required.					
	Surveis required.					
Commit Updates						
Re-Login						

Default Delivery Type

This preference applies during order entry. When an order is created, the Delivery Type field will auto-fill with the value you specify.

- 1. Navigate from Main Menu > System Admin > Preferences > Order Entry.
- 2. In the Sales Orders section, set the **Default Delivery Type** dropdown to either 'Ship Together' or 'Ship Separately'.

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Note: During order placement, the user can change the default delivery type, but it *cannot* be changed after an order has been invoiced.