Notification Automation Preferences

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aACE preference settings allow you to control when notifications are sent based on certain activities. Shown below are the default notification settings for sales and purchasing oversight, sales orders, and fulfillment.

Note: System administrators are the only user group with access to these sections. If your workflows require additional notification options, contact <u>aACE Support</u> about customized notification settings.

Sales and Purchasing Oversight Notifications

- 1. Navigate to Menu > Accounting > Preferences > Data Entry.
- 2. In the Oversight Notifications section, adjust settings as needed, then click **Commit Updates**.

| Period Management Updat Data Entry Post Date Integrations OpenEdge (CC & ACH) X-Charge (CC) Multi-O X-Check (E-Check) Preve Sage Pay (CC) Mana AvaTax Invoicint | e receipt Date to today on post. e Invoice Date to Receipt Date on post. e Disbursement Date to today on post. Limit Days fice Preferences ti multi-office cash transactions. ge office general ledgers separately. | | Use logged in team This can be found in th | Pile Format: JPEG or PNG, KGB colorspace member's signature when printing checks. heir team member record. | | |
|--|--|----------------------------|--|--|--|--|
| Period Management Updat Data Entry Integrations OpenEdge (CC & ACH) X-Charge (CC) Multi-O X-Check (E-Check) Sage Pay (CC) AvaTax | e Invoice Date to Receipt Date on post. Disbursement Date to today on post. Limit Days fice Preferences at multi-office cash transactions. | | Use logged in team This can be found in th | member's signature when printing checks. | | |
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| X-Charge (CC) Multi-O X-Check (E-Check) Preve Sage Pay (CC) Mana AvaTax Invoicin | nt multi-office cash transactions. | | | | | |
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| Sage Pay (CC) Mana AvaTax Invoicin | | | | | | |
| AvaTax Invoicin | e office general ledgers separately. | | | | | |
| Invoicir | | | | | | |
| | | | | | | |
| Use ta | g (Sales Taxes) | | Purchasing Auto-generate pending vendor credit memos for returns. X Show "Invalid PO" indicator for POs printed while pending. | | | |
| | x rates from order when invoicing. | | | | | |
| | taxes at the line item. This must be enabled | if line items for a single | | | | |
| transa | tion may have different tax profiles. | | | | | |
| Timesh | ets | | Inventory COGS Method LIFO Manage landed cost. Prevent inter-office COGS transactions. Update job costs with inventory actual cost. | | | |
| | ate GL entries from timesheets upon appro | val. This will post the | | | | |
| | xpense to accrued wages. | | | | | |
| | timesheets to auto-approve. Deselect this to SL entries are created. | have more control over | | | | |
| Allow | purchases to be generated from timesheet | s for freelancers. | | | | |
| Ge | nerate a separate purchase for each office. | | | | | |
| | | | | ,,,,, | | |
| Misc Lir | e Item Codes | | | | | |
| Adjustme | nts > Shipping > | Deposits > | Finance Charge > | Historical Balances > | | |
| ADJ | SHIP | DEPOSIT | | HIST | | |

Sales Order Notifications

1. Navigate to **System Admin** > **Preferences**.

- 2. In the sidebar, click **Order Entry**.
- 3. Scroll through the screen to locate the notification preferences highlighted below.
- 4. To activate an automation preference, mark the flag next to the notice description.
- 5. Click Commit Updates.

| mpany Preferences | Sales Orders | | | | | |
|-----------------------------|--|--|--------------------------------|---------------------------------|-------------------------------------|-------------------------------|
| My aACE Order Management | A Pending Order is a(an) | Default Order Type Sales | Sales Order Layout | Production Order Layout Service | Default Delivery Type Ship Together | Deliv Length 10 Business days |
| | Quote | | | | | |
| Order Entry | Free Shipping Type | Free Shipping | Allocate Shipping Cost By | | | |
| Billing | | | Value | | | |
| Procurement | X Allow multiple order | record types. Select this if u | isers will need the ability to | select "Sales", "Production", | or custom order types when | creating new orders. |
| Fulfillment | | r on save. Select this if order | | | or custom or der types men | for eaching the trade of |
| Shipping | | • | we pending and voided ord | ers hidden from search results | by default. | |
| Shipping | X Enable back order m | | | | | |
| stem Preferences | | anide (PSO) by default. Se a notification when paym | | rge fixed amounts for shipping | J. | |
| Automation Schedules | | | | t of line item codes during ord | er entry. | |
| Calendar | | | | | | |
| Database Management | Management Validation | | | | | |
| Document Management | Shipment quantity must | match order. | | | | |
| Menu Options | Order balance must be z Do not ship more than a | | | | | |
| Shipping Setup | | lucieu. | | | | |
| | | | | | | |
| | Leads | | | | | |
| Units of Measure | | | | | | |
| | | roject when a lead is won. | | | | |
| Units of Measure | Always generate a p | roject when a lead is won. | | | | |
| Units of Measure | Always generate a provide the second | roject when a lead is won. | | | | |
| Units of Measure | Always generate a portion of the second seco | roject when a lead is won. | | | | |
| Units of Measure | Always generate a provide the second | roject when a lead is won. | | | | |
| Units of Measure | Always generate a pr Validations Campaign is required. Type is required. Route is required. | roject when a lead is won. | | | | |
| Units of Measure | Always generate a pr Validations Campaign is required. Type is required. Route is required. | oject when a lead is won. | | | | |
| Units of Measure | Always generate a pr Validations Campaign is required. Type is required. Route is required. | oject when a lead is won. | | | | |
| Units of Measure | Always generate a pr Validations Campaign is required. Type is required. Route is required. | oject when a lead is won. | | | | |

Fulfillment Notifications

- 1. Navigate to **System Admin** > **Preferences**.
- 2. In the sidebar, click **Fulfillment**.
- 3. Scroll through the screen to locate the notification preferences highlighted below.
- 4. To activate an automation preference, mark the flag next to the notice description.
- 5. Click Commit Updates.

