

# Procurement Preferences

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System administrators can customize the preferences for streamlining purchase orders and purchases. Navigate to System Admin > Preferences > Procurement, then adjust the Procurement and Purchase Orders settings as needed.

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## Procurement Preferences

**Auto-generate purchase orders** – Marking this flag will enable aACE to automatically generate purchase orders for non-inventory items needed to fill an order.

## Purchase Order Preferences

- **Use order item cost rate** – Marking this flag will prompt users to update the cost of purchased products when they enter an order.
- **Append auto-generated items to pending POs** – Marking this flag adds auto-generated items to pending POs, consolidating product for sales orders into the fewest number of POs.
- **Trigger approval for POs over \_\_\_\_** – Marking this flag causes aACE to generate an approval notice to management for purchase orders over the stated amount. The purchasing workflow halts until the approval is given.

## Close Validations

Validations are checks and balances you can activate to ensure that the actual purchasing and receiving matches up against related purchase orders. These validation checks include:

- Purchase amount must match PO
- Received quantities must match PO
- Purchase quantity must match received quantity
- Do not purchase more than received
- Do not receive more than ordered
- PO Balance must be zero (before it can close)

## Default Delivery Type

When creating a PO, the Delivery Type field is automatically set to the value selected in this preference. This causes shipment logs to auto-generate when Shipping Integration is active. To use integrated shipping, this preference should be set to **Ship Together** or **Ship Separately**.

In order to access the integrated shipping features in aACE, the line item code must also be enabled for shipping and the PO must carry the proper delivery type.

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