Configuring Backorder Management

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This guide explains how to enable features for managing backorders and schedule them to run effectively. It is intended for system administrators.

When shipments are short due to low inventory, aACE can <u>help you manage backorders</u> (http://aace5.knowledgeowl.com/help/overview-of-back-order-management). After you set up this feature, your system watches for inventory replenishments, then automatically creates outgoing shipments to fill the waiting backorders.

Setting up backorder management includes:

- 1. Enabling the preference.
- 2. Configuring the two automation schedules.

Enabling the Backorder Management Preference

Because effective backorder management hinges on accurate inventory records, this feature is typically *not* enabled when aACE is first deployed. When your organization is ready, you can easily activate this feature:

- 1. Navigate from Main Menu > System Admin > Preferences > Order Entry.
- 2. Mark the flag to Enable back order management.

aACE Software

| | | | System Prefere | nces | | | | | | |
|----------------------|--|------------------------------|--------------------------------|------------------------------------|----------------------------|----------------------|--|--|--|--|
| Company Preferences | Sales Orders | | | | | | | | | |
| My aACE | A Pending Order is a(an) | Default Order Type | Sales Order Layout | Production Order Layout | Default Delivery Type | Deliv Length | | | | |
| Order Management | Quote | Sales | Price-Based | Service | Ship Together | 10 Business days | | | | |
| Order Entry | Free Shipping Type | Free Shipping | | ly . | | | | | | |
| Billing | | | Value | | | | | | | |
| Procurement | X Allow multiple order | record types. Select this if | users will need the ability | to select "Sales", "Production", (| or custom order types when | creating new orders. | | | | |
| Fulfillment | X Prompt to open orde | | | | | | | | | |
| Shipping | X Enable back order ma | | ave pending and voided or | ders hidden from search results | by default. | | | | | |
| System Preferences | | | elect this if you typically ch | arge fixed amounts for shipping | j. | | | | | |
| Automation Schedules | | a notification when payn | | st of line item codes during ord | | | | | | |
| Calendar | Segregate line item o | odes by omice. Select this | to yield an omce-specific li | st or line item codes during ord | er entry. | | | | | |
| Database Management | Management Validations | | | | | | | | | |
| Document Management | Shipment quantity must | match order. | | | | | | | | |
| Menu Options | Order balance must be z Do not ship more than o | | | | | | | | | |
| Shipping Setup | | | | | | | | | | |
| Units of Measure | Leads | | | | | | | | | |
| Value Lists | Always generate a pr | oject when a lead is won | | | | | | | | |
| | Validations | | | | | | | | | |
| | Campaign is required. | | | | | | | | | |
| | Type is required. Route is required. | | | | | | | | | |
| | Source is required. | | | | | | | | | |
| | | | | | | | | | | |
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| | | | | | | | | | | |
| Commit Updates | | | | | | | | | | |

3. Click Commit Updates.

Configuring the Automation Schedules

The aACE scheduling engine helps things run smoothly for end users, while still accomplishing tasks on the time-frame best suited to your organization. It uses two schedules to determine when aACE automatically checks for and processes backorders.

- 1. Navigate from Main Menu > System Admin > Preferences > Automation Schedules > Schedule Setup tab.
- 2. Mark the flags for these two options:
 - 7792 Primary Backorder Process
 - 8050 Secondary Backorder Process

| | | 0, | stem Preferences | | | | | | | | | |
|----------------------|--------------------------|--|--------------------|---------|-------|-------------|--------------------|----------------------|---|-----|--|--|
| ompany Preferences | X Server Schedules | | | | | | | | Oldest server schedule cycle: 3 minutes | | | |
| My aACE | Schedule St | atus Schedule Setup FM Serv | er Timer Schedules | | | | | | | | | |
| Order Management | On Schedule Script Group | | | | Run F | verv | On Days | Between Hours | | | | |
| Order Entry | \$ X 4352 | Update Fulfillment | A | I | | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | × ^ | | |
| Billing | \$ X 4399 | Post Pending Job Costs | В | 9 | 1 | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Procurement | \$ × 4337 | Update Inventory Balances | с | 9 | 1 | Every Cycle | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Fulfillment | 1 X 4353 | Update Accounting Balances | А | 0)) 0)) | 1 | Every Cycle | SMTWTFS SMTWTFS | 12:00 AM 12:00 AM | 11:59 PM 11:59 PM | × | | |
| Shipping | \$ × 4802 | Update Manually Adjusted Task Anchor | rs B | | | Every Cycle | | | | | | |
| System Preferences | \$ X 8542 | Calendar Sync | D | 9 | 1 | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Automation Schedules | \$ X 7666 | Mobile Integration | С | 9 | 1 | Every Cycle | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Calendar | \$ 7665 | eCommerce Integration | A | 9 | 10 | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Database Management | \$ 7655 | Update Shipments from Integrated Shi | pping C | | 1 | Minutes | -MTWTFS | 12:00 AM | 11:59 PM | × | | |
| Document Management | \$ 8009 | Transmit Shipments | С | ())) | 1 | Every Cycle | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Menu Options | \$ 4960 | Auto-Incomplete Tasks | A | 99 | 30 | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| Shipping Setup | \$ X 8402 | Update Commissions | с | | 30 | Minutes | -MTWTF- | 9:00 AM | 5:00 PM | × | | |
| Units of Measure | \$ X 7651 | Self-Heal Accounting Balances | В | 0))) | 1 | Days | SMTWTFS | 4:00 AM | 5:00 AM | × | | |
| Value Lists | \$ X 7650 | Self-Heal Inventory Balances | С | | 1 | Days | SMTWTFS | 4:00 AM | 5:00 AM | ж | | |
| | \$ 8325 | Delete Orphaned Documents | С | 0)) | 1 | Days | S | 12:00 AM | 11:59 PM | × | | |
| Commit Updates | 1 X 7792 | Primary Backorder Process | А | | 3 | Hours | -MTWTF- | 6:00 AM | 8:00 PM | × | | |
| | \$ × 8050 | Secondary Backorder Process | В | 9 | 1 | Days | SMTWTFS | 9:00 PM | 11:59 PM | × | | |
| | \$ 4433 | Auto-Update Cost Rates | В | | 1 | Days | S | 1:00 AM | 11:59 PM | × | | |
| | \$ X 4430 | Update Current Period/Fiscal Year | С | 0)) | 1 | Days | SMTWTFS | 12:00 AM | 12:00 AM | × | | |
| | \$ 🗙 8602 | Auto-Generate Progress Billing Invoice | s B | | 1 | Days | SMTWTFS | 4:00 AM | 6:00 AM | × | | |
| | \$ 4465 | Auto-Generate Recurring Transactions | A | ())) | 1 | Days | SMTWTFS | 3:00 AM | 11:59 PM | × | | |
| | \$ 4669 | Auto-Generate Daily Timesheets | В | ())) | 1 | Days | SMTWTFS | 12:00 AM | 11:59 PM | × | | |
| | \$ 8235 | Send Web Timesheet Emails | С | ())) | 1 | Days | -MTWTF- | 12:00 AM | 11:59 PM | × | | |
| | \$ 8236 | Download Web Timesheets | A | 9 | 30 | Minutes | SMTWTFS | 12:00 AM | 11:59 PM | * | | |

- 3. Configure the schedule settings so each process runs at an appropriate time (see below).
- 4. Click Commit Updates.

Scheduling the Backorder Processes

The Primary Backorder Process evaluates incoming shipments and generates backorder shipments. You can run this process more frequently (e.g. every 30 minutes).

The Secondary Backorder Process evaluates changes from inventory adjustments, voids, returns, etc., and fulfills backorders from the Available balance. This process should run less frequently. This is because it evaluates updates that are less stable. For example, a user might void an order, releasing inventory back into the the Available count. But that might only be a momentary spike because she intends to create a new order which will require that inventory.