Working with Orders

Last Modified on 10/03/2022 11:22 am EDT

> This guide explains various ways you can work with order records and offers best practices to help you be most efficient. It is intended for general users.

After you create an order, you can work with the record in different ways:

- Managing orders
- Duplicating orders
- Updating orders
- Voiding orders

Managing an Order

It's vital for your organization to have best practices and clear policies for managing orders. Details to keep in mind include:

- Orders must be fully shipped and fully invoiced *before* they can close. In other words, the quantities for each item must match from order to invoice to shipping log (if applicable).
- If you change or adjust an order, be sure to adjust that order's shipment records and related invoices.
- When you make adjustments and changes, keep detailed notes on the order record (and if necessary at the line-item level). This record-keeping saves time if the order needs to be audited.
- Each order is linked to an office, which is initially based on the office assignment of the team member who created the order. The current office assignment is noted in the Order module footer. You can manually change this office assignment. The office assignment can impact branding on printouts (e.g. quotes, invoices, etc), as well as which line item codes (LICs) will be available for the order (i.e. when you open the order, aACE validates the LICs to verify they can be sold from the designated office).

Duplicating an Order

You can quickly create a new order based on an existing order: At the original order detail view, click Actions > Duplicate Order. You can customize the new, pending record as needed.

When you duplicate an order, only information that would be applicable to a new record is

duplicated. Other information is *not* duplicated, including:

- Modified LIC Prices — If the original order included customized unit prices, aACE will display a dialog asking how you wish to handle the custom pricing. You can either click Default to reset all unit prices to the standard LIC pricing or click Keep to preserve the original order's modified unit prices. Note: Unit adjustments to pricing will be preserved even if you click Default.
- Shipping Costs and Prices — The estimated shipping cost and price are recalculated based on the product LICs in the order and the default shipping LIC. These values are not duplicated even if the items ordered, the shipping destination, and the courier are exactly the same. This is because courier rates and internal policies could easily be different from when the original order was created.
- Dates — No dates on the Sales Order tab are duplicated. Instead, the record date and fulfillment Start Date are reset to the current date. The End (Delivery) date is then calculated based on your [system preferences for delivery length](https://aace5.knowledgeowl.com/help/overview-of-orders#SalesOrdersDropdownLists).
- Record Assignments — The assignment and tracking fields in the footer are reset to your system preferences.

Updating an Order

Editing

You can change details on an existing order that is in Open status. (If the order is closed, re-open it using Actions > Open Order.) At the details view of the order, click Edit, make the needed changes, then click Save.

Revising

Revising an order is different from editing: a revision maintains a snapshot of the original, while an edit changes the original.

Revisions are typically used for change requests. For example, if you send an estimate to a client and they approve the project, but later request some changes, it can be effective to simply revise the order. At the details view of the order, click Actions > Revise Order. At the confirmation dialog, click Revise. A revised order is created with a "-R1" suffix and the current date. Edit the new version of the order, then click Save.

Note: Your organization's policies and procedures should determine when an order is revised rather than edited.

Searching for Revised Orders and Jobs

When you need to locate a revised order, it's best to search only for the *initial* order number. Do *not* reference the revision suffix numbers or job numbers.

The practical reason for not basing records off the job number is because the original numbered assignments might have been distributed among your employees to work on, and they may not know when the order is revised. For example, if a job is released to the floor as 12345.1 and barcodes have been printed. Updating the number to 12345.1-1R would invalidate those first barcodes. Employees would not be able to submit time and materials until a new barcode is printed. Note: Users working in Grace with the orders system have less of an issue. If they search 12345 (with no record status constraints), they'll see both 12345 and 12345-1R. They can make an informed decision about which to use (i.e. avoiding the invalid one).

Tips for Updating Orders

- Always edit records in aACE so that orders reflect reality. This ensures you will always have an accurate picture if you need to refer back.
- Always make necessary adjustments to the order's related records (e.g. purchase orders, shipments, and invoices). Refer to your internal workflows and policies as needed.
- Always add comments for historical reference when you make adjustments. You can enter notes on the order (http://aace5.knowledgeowl.com/help/adding-and-using-notes) itself or add comments on the order log (https://aace5.knowledgeowl.com/help/adding-activities-support-or-next-steps).

Voiding an Order

Warning: Once you void a record, it *cannot* be un-voided. Before canceling or voiding records, be sure to review your internal policies and procedures.

When an order must be cancelled, you should typically void the record (Actions > Void Order > type "Void" > click Void). You should always enter a comment on the record log (https://aace5.knowledgeowl.com/help/overview-of-record-logs) to explain why you voided the order.

However orders often have related records (e.g. shipments and payments). aACE will prevent you from voiding an order that has active related records. You must address those items, which might include:

- Processing the return shipment (http://aace5.knowledgeowl.com/help/processing-customer-returns) from the customer

- Issuing a credit to the customer (http://aace5.knowledgeowl.com/help/issuing-a-customer-credit)
- Handling a refund:
    - Use the customer credit to pay for a new order (http://aace5.knowledgeowl.com/help/applying-a-customer-credit-to-an-invoice)
    - Issue a refund a check (http://aace5.knowledgeowl.com/help/issuing-refunds-for-checks)
    - Issue a refund a credit card transaction (http://aace5.knowledgeowl.com/help/voiding-and-processing-partial-refunds-for-receipts)

Note: It is always best to update aACE records to reflect how the situation was actually handled. This helps keep inventory and accounting in balance, and helps maintain a clear audit trail.