Accessing Order Management Modules

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> This guide provides an overview of the Order Management modules. It is intended for general users.

Managing work in aACE can be divided into a hierarchy of related records: projects > orders > jobs > job costs > tasks > shipments. Access these records from the Main Menu's section for Order Management.

Projects

A project is a client-specific "bucket" for holding orders. It is an open-ended module that is not strictly defined because it can be used for various purposes:

- A software company might use a project to represent an annual service contract or support agreement. Many orders for the same client can fall under the project, all pertaining to the same service contract.
- A magazine company might use projects to track magazine advertisers, where each project is a contract for a specified number of ads.
- A service company might use projects to track retainers paid by their clients.

Your organization's unique workflows will determine the best use of the Projects module.

Orders

Orders are records that represent sales. They generate revenue and accumulate costs. Management can view them with granularity for transaction-level budgeting and profitability analysis. The level of information and the tools available to users in the Orders module is controlled by User Group access privileges (http://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups).

Jobs

Jobs serve as the tracking mechanism for an order's budget, costs, fulfillment, and procurement.

Job Costs

Job Costs are records that track costs associated with a job.

Tasks

Tasks are to-dos for your team members. They can be attached to any record in the system and can be created manually or be created automatically based on pre-defined templates (https://aace6.knowledgeowl.com/help/overview-of-templates). Time can be applied against tasks for granular time-tracking and reporting.

Shipments

The Shipping Log module tracks all shipments coming into and going out of your facility. For procurement tracking, shipments are associated with purchase orders; for fulfillment tracking, shipments are associated with orders.