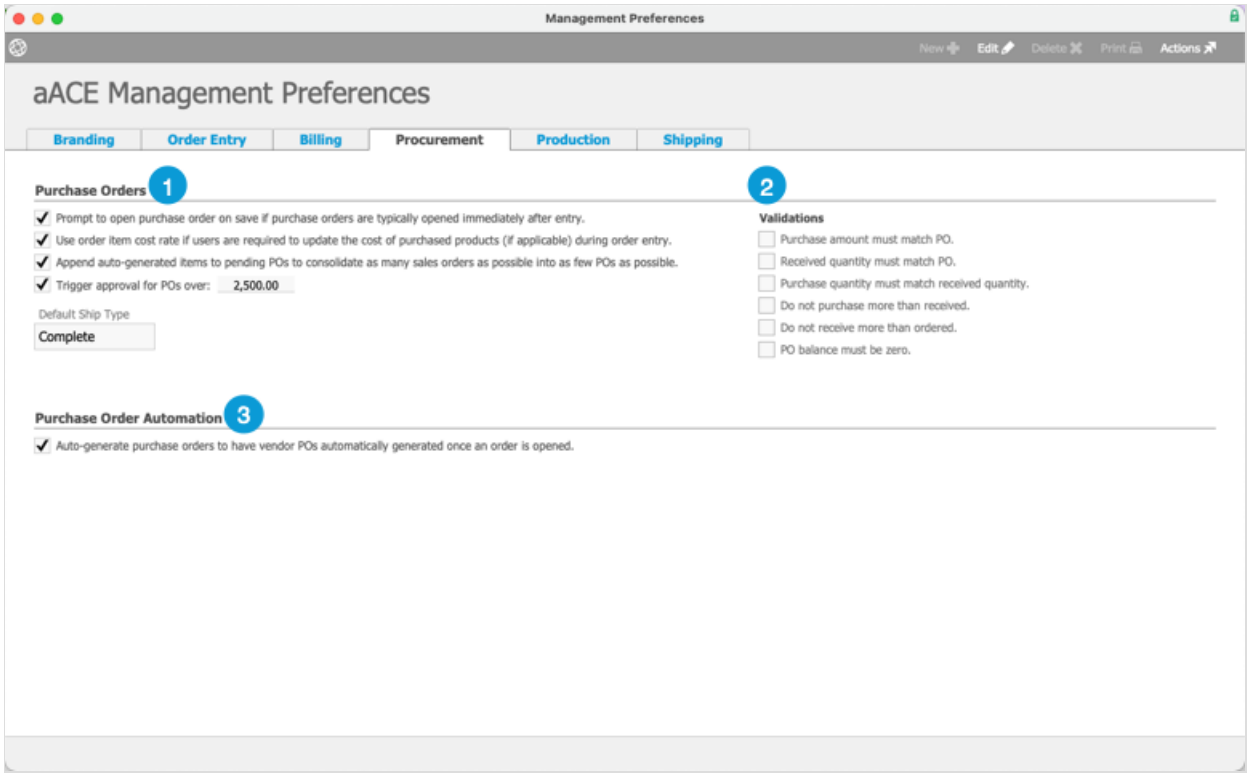
Overview of Procurement Preferences

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This guide provides an overview of customizing procurement preferences. It is intended for system administrators.

System administrators can customize various preferences for streamlining purchase orders (POs) and purchases. Navigate from Main Menu > Internal > Management Preferences > Procurement:



1. Purchase Orders

You can customize preferences for opening and managing purchase orders with these flags:

- **Prompt to open purchase order on save if purchase orders are typically opened immediately after entry**
- **Use order item cost rate if users are required to update the cost of purchased products (if applicable) during order entry** — If you mark this flag, when your team creates orders that require procurement, the pricing they specify on the order will also be applied on the purchase order. If you clear this flag, the pricing on the PO will instead be populated from the line item code (LIC) record.

- **Append auto-generated items to pending POs to consolidate as many sales orders as possible into as few POs as possible** — Applies to backordered and other automatic purchases.
  On the Inventory Management tab of an LIC, be sure that the Method and vendor ID are specified. The vendor ID specified in the From field will override the general Preferred Vendor setting. Office-specific settings may also affect results (e.g. pending POs from one office are only appended with order items from the same office).
- **Trigger approval for POs over** — aACE sends an approval notice to the appropriate team (https://aace6.knowledgeowl.com/help/setting-up-teams) for purchase orders over the specified amount. The purchasing workflow halts until that team reviews the PO.

Default Ship Type

When creating a PO, the Ship Type field (https://aace6.knowledgeowl.com/help/understanding-order-and-purchase-order-ship-types) is automatically set to the value selected in this preference. This enables shipment logs to auto-generate when Shipping Integration is active. To use integrated shipping, this preference should be set to Complete or Partials OK.

In order to access the integrated shipping features in aACE, the LIC must have the 'Enable outgoing shipments in Orders (https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#LICDetailViewSetupTab)' flag marked. The PO must also carry one of the ship types stated above.

2. Validations

Validations are checks and balances you can activate to ensure that the actual purchasing and receiving matches up against related purchase orders. When you mark one of these flags, aACE will check for the corresponding condition when a team member tries to close a record involved in the procurement workflow (i.e. POs, purchases, shipments).

Note: Some of these validations apply to auto-closing POs. Team members may still able to manually close POs using the Actions options.

- **Purchased amount must match PO** — Prevents aACE from auto-closing the PO when the purchase total cost does not match the PO total cost
- **Received quantity must match PO** — The PO cannot be closed if the ordered quantity does not match the received shipment quantity.
- **Purchase quantity must match received quantity** — Does not allow aACE to auto-close the PO when the purchase quantity does not match the received shipment quantity
- **Do not purchase more than received** — Prevents team members from opening a

purchase if the purchase quantity is more than the received shipment quantity

- **Do not receive more than ordered** — Prevents team members from marking Shipment records as received if the number of Shipped items exceed the number of ordered items
- **PO Balance must be zero** — The PO can only be closed if the PO Balance is zero.

3. Purchase Order Automation

aACE can auto-generate purchase orders for your system. However, your team should discuss this workflow carefully before implementing it. For more information, read our guide on Order Procurement Automation (https://aace6.knowledgeowl.com/help/order-procurement-automation).

- **Auto-generate purchase orders to have vendor POs automatically generated once an order is opened** — When a team member marks an order as opened, aACE auto-generates a PO for that order.
