

Notification Automation Preferences

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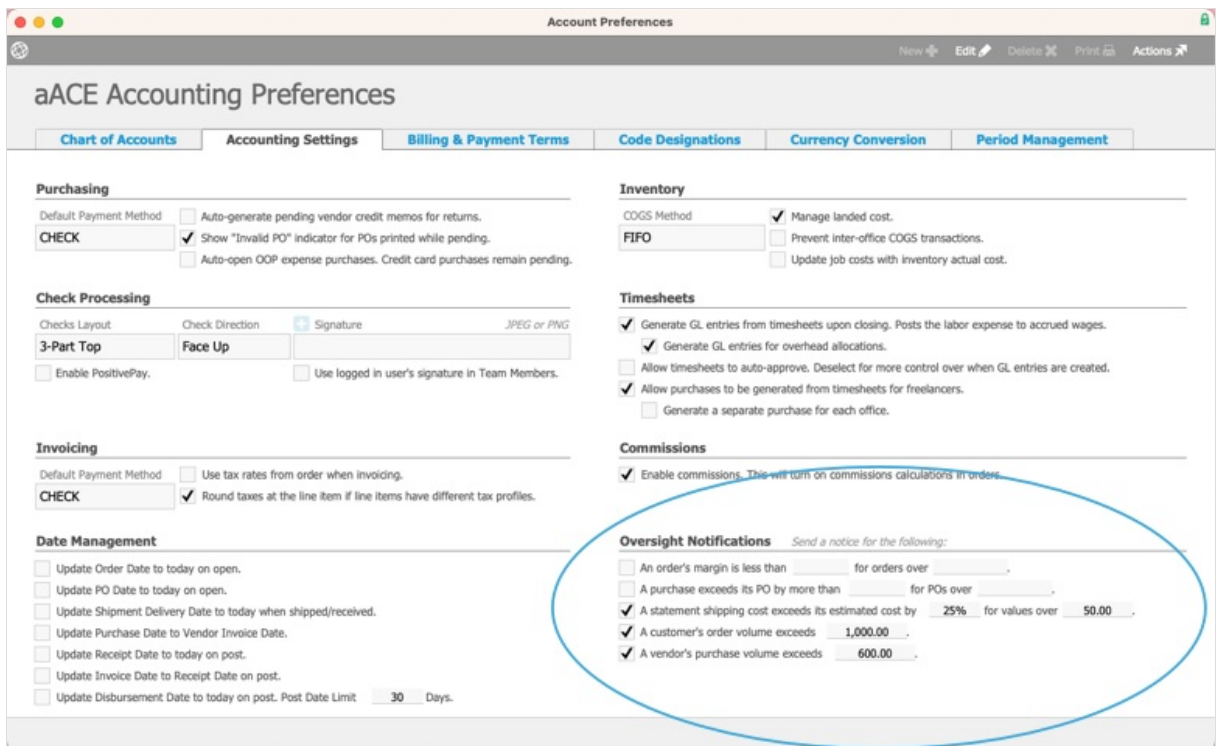
This guide explains how to adjust the automated notification preferences. It is intended for advanced users.

aACE preferences allow system administrators and certain advanced users to control when notifications are sent about certain activities. Shown below are the default notification settings for sales and purchasing oversight, order payments, and production.

Note: If your workflows require additional notification options, contact [aACE Support](#) or your aACE partner about customized notification settings.

Sales and Purchasing Oversight Notifications

1. Navigate from **Main Menu > Accounting > Accounting Preferences > Accounting Settings** tab, then click **Edit**.
2. In the Oversight Notifications section, mark or clear the flags as needed, then click **Save**.



Order Payment and Production Notifications

Additional preferences are found in the Management Preferences module. Navigate from

Main Menu > Internal > Management Preferences.

Order Payment Notification

The payment notification preference specifies whether order managers will receive a notification when a payment is received.

1. From the Management Preferences module, go to the **Order Entry** tab, then click **Edit**.
2. In the Orders section, mark or clear the flag, then click **Save**.

The screenshot shows the 'aACE Management Preferences' window with the 'Order Entry' tab selected. Under the 'Orders' section, there are several settings:

- Pending Order Label: Quote
- Default Order Rec Type: SALES
- Sales Order Layout: Price-Based
- Production Order Layout: Default
- Checkboxes:
 - Allow multiple order record types. Users can select "Sales", "Production", or custom order types when creating orders.
 - Prompt to open order on save. Select this if orders are typically opened immediately after entry.
 - Open / Closed (O/C) by default. Select this to have pending and voided orders hidden from search results by default.
 - Enable back order management.
 - Send order manager a notification when payment is received. (This checkbox is circled in red in the original image.)
 - Segregate line item codes by office. Select this to yield an office-specific list of line item codes during order entry.
- Validations:
 - Invoice amount must match order.
 - Shipment quantity must match order.
 - Order balance must be zero.
 - Do not ship more than ordered.

Below the 'Orders' section is the 'Order Shipping' section with fields for Default Ship Type (Complete), Free Shipping Type (Value (Dollars)), Free Shipping (1,000.00), Allocate Shipping By (Value), and Delivery Len (Days) (2). There is also a checkbox for 'Do not automatically ship order items prior to their designated Ship Date.' which is unchecked.

The 'Projects' section has a checkbox for 'Prompt to open project on save. Select this if projects are typically opened immediately after entry.' which is checked.

The 'Leads' section has a 'Default Length (Days)' field set to 30 and a checkbox for 'Always generate a project when a lead is won.' which is unchecked. There are also checkboxes for 'Sales Rep is required.', 'Campaign is required.', 'Type is required.', 'Route is required.', and 'Source is required.', all of which are unchecked.

Production Notifications

Production notification preferences help ensure clear communications for job assignments and task completion.

1. From the Management Preferences module, go to the **Production** tab, then click **Edit**.
2. In the Jobs section and Tasks section, mark or clear the flags as needed, then click **Save**.

Management Preferences

New Edit Delete Print Actions

aACE Management Preferences

Branding Order Entry Billing Procurement **Production** Shipping

Jobs

- Schedule sub-jobs before the parent job.
- Manage job tasks sequentially.
- Send assignment notice on creation.
- Send assignment notice on open.

Jobs Automation

- Auto-open production jobs.
- Auto-close jobs when all tasks are complete.
- Auto-close jobs when they are fully costed.
- Auto-apply inventory costs on receipt (incoming shipments or purchases, depending on the transaction).
- Auto-apply production cost on close.
- Auto-close order job.

Tasks

- Notify assigner when task is completed.

Tasks Automation

- Mark as incomplete on start date. Select this to have new tasks default to this behavior. This behavior can be changed on a task-by-task basis.

Inventory

- Backflush inventory entry.
- Require bin selection in Shipping Log and Jobs.
- Validate available inventory balance.
- Validate bin inventory balance.

Default Replenishment Target
0

Default Replenishment Threshold
0

Time

- Generate time entries from call dialog.
- Allow time to be posted to closed jobs from Timesheets.
- The maximum hours for a timesheet is: _____

Cancel Save