Using the aACE Orders App

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This guide explains how to create and review orders on the Orders mobile app. It is intended for general users.

The aACE Orders App allows you to view existing orders that are in Open status, review their details, and also create new orders. It is designed for individual users to use on their iPad.

After your system administrator has configured the Orders App (https://aace6.knowledgeowl.com/help/configuring-the-aace-orders-app) on your device, you can open it to review and create orders.

Note: If your system administrator has customized the app, some details in this guide may no longer match your system.

On Open

When you open the app, it displays a list of all orders currently in Open status.

Orders App Icons

	Refresh	Refreshes the orders data in the app.
	Add	Creates a new order record.
	Actions Menu	Displays a popover with additional settings for the app.
	Clear	Removes data from the current field or closes the current popover.
	Delete	Deletes the record.
	Sort	Displays options for sorting the current list of records.
	Envelope	Displays the customer's bill-to address, including a link that displays the location in a mapping app.

	Pin	Adds a new note linked to a record.
	Add Comment	Displays a popover for entering a new activity or comment.
	Expand	Enlarges the field as a popover.
	Gear	Opens the settings popup where you can adjust network connections and sync the app.
	Return to List	Closes the detail view of an order and returns to the list view.
	App Launcher	Closes the app and returns to the FileMaker App Launcher.

Orders App Workflows

Reviewing Open Orders

You can easily check the status of open orders.

1. Search, sort, or scroll to locate the desired order.
   Note: If the order doesn't appear in the list, tap the **Refresh** icon to get the latest order info from your aACE system.
2. Tap the order title to display a list of order items.
   Depending on your tablet's current layout, you can review different details about these items:
   - Portrait — Unit prices and order totals.
     Note: This layout is required to navigate back to the list view or browse through the list of orders.
   - Landscape — Unit quantities procured, produced, invoiced, shipped, etc.
3. Tap the **Details** tab to see additional info:
   - Customer's contact person
   - Bill To / Ship To information
   - Any currently logged activities or comments
   - Any notes about the order or customer
   - A popover to access info about the sales rep and customer

Creating a New Order

1. At the orders list view, tap the **Add** icon.
2. Assign a customer with one of these methods:
    - If your system administrator has configured a default customer (e.g. Guest Checkout) for mobile orders, that customer name is automatically entered
      Note: The order's Ship Type is automatically set to in-store Pick Up.
    - Tap the **Customer** field and search for the desired existing customer
    - Tap the **Add** icon to create a new contact record for a first-time customer
3. Add items with one of these methods:
    - Scan item bar codes using your device camera or an attached bar code scanner
    - Tap the **Search Item** button and enter an item code or description
4. Adjust quantities (including decimals) — Tap the current number in the **Qty** column to access the Quantity Calculator, then:
    - Replace the current number — Enter a number and tap Enter.
    - Increase the current number — Tap Plus, then enter the number.
    - Reduce the current number — Tap Minus, then enter the number.
5. Tap **Complete Order**.
   Note: If the customer decides to *not* submit the order, tap Cancel.

The Orders App immediately transfers any new contact data to your aACE system, then attempts to transfer the order. aACE runs standard validations on the order:

- If the order data is all correct, it is transferred to aACE and updated to Open status.
- If there are any issues, aACE returns an error message, leaving the order in Pending status in your app.

Note: If you submit an order that includes new contact data, but the order has a validation error and then the customer decides to cancel the order, the contact data will already be in your aACE system. You must manually locate and delete the new contact record.

Troubleshooting and Customizing the App

If you need to troubleshoot the data or update settings to customize the app for your personal workflows, please have your system administrator refer to the guide for configuring this app (http://aace6.knowledgeowl.com/help/configuring-the-aace-job-shop-app).