Configuring Backorder Management

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This guide explains how to configure features for managing backorders and schedule them to run effectively. It is intended for system administrators.

When shipments are short due to low inventory, aACE can <u>help you manage backorders</u> (http://aace6.knowledgeowl.com/help/overview-of-back-order-management). After you set up this feature, your system watches for incoming inventory replenishment shipments, then automatically creates outgoing shipments to fill waiting backorders.

Setting up backorder management requires:

- 1. Enabling the preference
- 2. Configuring the automation schedules

1. Enabling the Backorder Management Preference

Because effective backorder management hinges on accurate inventory records, this feature is typically *not* enabled when aACE is first deployed. Once your organization is ready, you can easily activate this feature:

- 1. Navigate from Main Menu > Internal > Management Preferences > Order Entry.
- 2. Click Edit, then mark the flag to Enable back order management.

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	er on save. Select this if orders a					Order balance must be zero	o.
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	by default. Select this to have	pending and voided	orders nidden nom se	arch results by default.			
Enable back order n	management.						
	a notification when payment is	manhand					
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Segregate line item	codes by office. Select this to yi	eld an office-specific	c list of line item codes	during order entry.			
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3. Click Save.

2. Configuring the Automation Schedules

The aACE scheduling engine helps things run smoothly for your team members while accomplishing tasks on the time-frame best suited to your organization. It provides two schedules you can set to determine when aACE checks for and processes backorders.

- 1. Navigate from Main Menu > System Admin > System Preferences > Automation Schedules > Schedule Setup.
- 2. Mark the flags for these two options:
 - 7792 Primary Backorder Process
 - 8050 Secondary Backorder Process

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24 🗸	8050	Secondary Backorder Process					8	1	Days	-MTWTF-	9:00 PM	11:59 PM	×
25	4433	Auto-Update Cost Rate	s			В	8	1	Days	S	1:00 AM	11:59 PM	ж
26	8885	Automatic Credit Hold				A	8	1	Days	SMTWTFS	4:00 AM	5:00 AM	ж
27 🖌	4430	Update Current Period/Fiscal Year						1	Days	SMTWTFS	12:00 AM	12:00 AM	ж
28 🖌	8602	Auto-Generate Progress Billing Invoices					8	1	Days	SMTWTFS	4:00 AM	6:00 AM	ж
29 🖌	4465	Auto-Generate Recurrin	ng Transactions			Α	8	1	Days	SMTWTFS	3:00 AM	11:59 PM	ж
30	4669	Auto-Generate Daily Tir	mesheets			В	8	1	Days	SMTWTFS	12:00 AM	11:59 PM	ж
31 🖌	4621	Send Important Date N	lotifications			с		1	Days	SMTWTFS	12:00 AM	11:59 PM	ж
32 🖌	4662	Auto-Reverse GJ Entrie	s			Α	8	1	Days	SMTWTFS	3:00 AM	4:00 AM	ж
33	11038	Update GL Budget Actu	uals			A	8	1	Days	SMTWTFS	4:00 AM	6:00 AM	×
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3. Configure the schedule settings (e.g. Run Every..., On Days..., etc) so each process runs at an appropriate time.

Note: aACE automatically saves updates you make in the Schedule Setup tab.

Understanding the Backorder Processes and Scheduling Effectively

The Primary Backorder Process evaluates changes in your available inventory from incoming shipments and it generates outgoing shipments for backordered items. You can run this process frequently (e.g. every 30 minutes).

The Secondary Backorder Process evaluates changes in available inventory from inventory adjustments, voids, and returns. Then it generates outgoing shipments for backordered items. This process should run less frequently (e.g. at the end of the day). This is because it evaluates updates that happen less often through a typical work day.

For example, a team member might void an existing order, releasing inventory back into the the Available count. However, that increase in Available product might only be momentary because the team member intends to create a new order using that same product.