Working with Orders

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This guide explains various ways you can work with order records and best practices for efficiency. It is intended for general users.

After you create an order, you can work with the record in different ways.

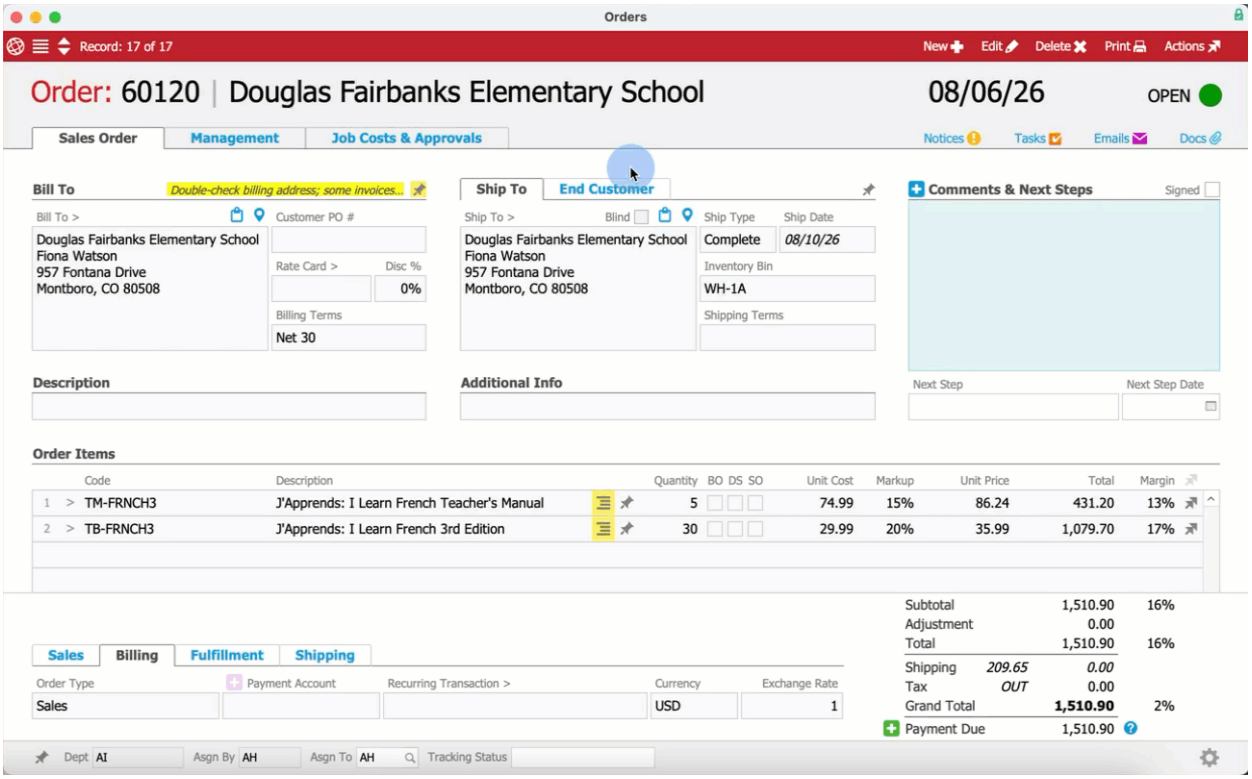
Managing an Order

It's vital for your organization to have best practices and clear policies for managing orders. Details to keep in mind include:

- Orders must be fully shipped and fully invoiced before they can close. The quantities for each item must match from order to invoice to shipping log (if applicable).
- If you change or adjust an order, you must adjust the order shipments and invoices. Additionally, keep detailed notes on the order record.
- Each order is linked to an office, which is determined by the office of the team member who created the order. You can manually change this office assignment. The current office assignment is noted in the order module footer. The office assignment can impact branding on printouts (e.g. quotes, invoices, etc), as well as which line item codes (LICs) will be available for the order (i.e. when you open the order, aACE validates the LICs to verify they can be sold from the current office).

Duplicating an Order

You can create a new order based on an existing order. At the detail view of the original order, select Actions > Duplicate Order. You can edit the new, pending record as needed.



When you duplicate an order, only information that would be applicable to a new record is duplicated. Other information is not duplicated, including:

- Modified LIC Prices — If the original order included customized unit prices, aACE asks if you want to clear the custom pricing or keep them. Unit adjustments to pricing will be preserved even if you select Default.
- Shipping Costs and Prices — The estimated shipping cost and price are recalculated based on the product LICs in the order and the default shipping LIC. These values are not duplicated even if the items ordered, the shipping destination, and the courier are exactly the same. This is because courier rates and internal policies could be different from when the original order was created.
- Dates — No dates on the Sales Order tab are duplicated. Instead, the record date and fulfillment Start Date are reset to the current date. The End (Delivery) date is then calculated based on your system preferences for delivery length (https://aace6.knowledgeowl.com/help/overview-of-orders#SalesOrdersDropdownLists).
- Record Assignments — The assignment and tracking fields in the footer are reset to your system preferences.

Updating an Order

You can edit an order directly or create a revision for the order.

Editing an Order

You can change details on an existing order that is in Open status. At the detail view of the order, select Edit, make the needed changes, then select Save.

If the order is closed, you can re-open it by selecting Actions > Open Order.

Creating an Order Revision

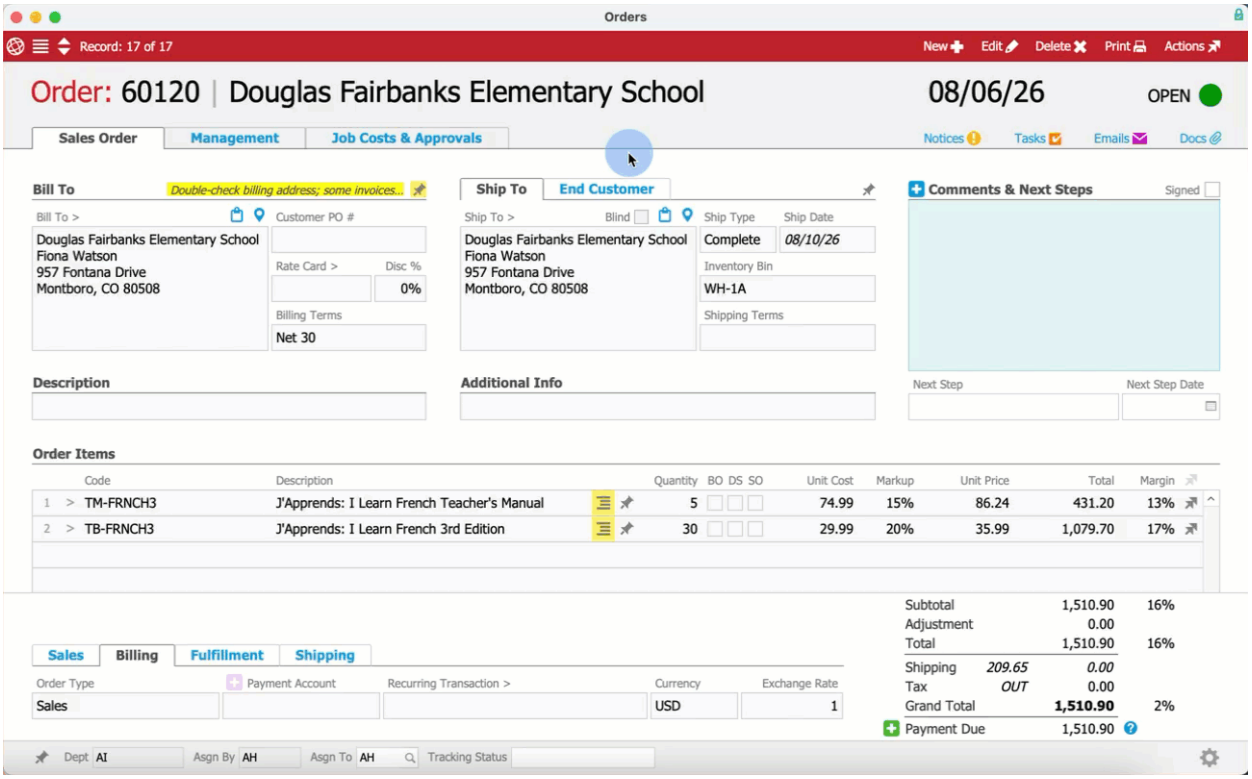
To create a revision for an order, refer to Creating Revisions for Orders and Purchase Orders (https://aace6.knowledgeowl.com/help/creating-revisions-for-orders-and-purchase-orders).

When creating an order revision, always make necessary adjustments to the order's related records (e.g. purchase orders, shipments, and invoices). Additionally, add comments for historical reference when you make adjustments. You can enter notes on the order (https://aace6.knowledgeowl.com/help/adding-and-using-notes) itself or add comments on the order log (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps).

Voiding an Order

Once you void a record, the action cannot be reversed. Before canceling or voiding records, be sure to review your internal policies and procedures.

When an order must be cancelled, you should typically void the record. You should always enter a comment on the record log (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) to explain why you voided the order. You can void an order by selecting Actions > Void > entering a reason for voiding the order > Void.



However, aACE will prevent you from voiding an order that has active related records. You must address the related records, which might include:

- Processing the return shipment (https://aace6.knowledgeowl.com/help/understanding-processes-for-customer-returns) from the customer
- Issuing a credit to the customer (https://aace6.knowledgeowl.com/help/issuing-a-customer-credit)
- Handling a refund:
  - Use the customer credit to pay for a new order (https://aace6.knowledgeowl.com/help/applying-a-customer-credit-to-an-invoice)
  - Issue a refund for a check (https://aace6.knowledgeowl.com/help/processing-refunds-for-customer-payments)
  - Issue a refund for a credit card transaction (https://aace6.knowledgeowl.com/help/processing-refunds-for-customer-credit-card-payments)

Ensure you update aACE records to reflect how the situation was actually handled. This helps keep inventory and accounting in balance and maintains a clear audit trail.