# Managing Shipping and Receiving

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This guide explains how shipping logs are organized and how system preferences can assist with managing the information. It is intended for system administrators.

When you activate <u>inventory tracking (https://aace6.knowledgeowl.com/help/setting-up-inventory-tracking</u>), shipments linked to purchases and orders affect inventory balances. With this feature, aACE <u>logs</u> <u>shipments (https://aace6.knowledgeowl.com/help/updating-shipments-for-orders)</u> to record the movement of items in and out of your facility, even if the goods are not categorized as inventoried items.

It is important to establish and follow best practices for shipping and receiving. As a general rule, you should *always* record shipments in aACE to match reality in your warehouse. As you log shipments accurately, you will maintain inventory levels and your warehouse staff can conduct audits more efficiently.

You can utilize various aACE preferences to help manage the processes for shipping and receiving, each discussed below:

- Shipping Automation
- Shipping Delivery Dates
- Gathering Log Data to Report on Shipping

# **Shipping Automation**

You can configure three primary settings to help automate shipping-related data entry and workflows. In addition to these three system preferences, your applicable LICs must have the <u>'Enable outgoing shipments in Orders'</u> (https://aace6.knowledgeowl.com/help/overview-of-line-itemcodes#LICDetailViewSetupTab) preference flagged to connect to automated shipping features.

- 1. Auto-Generate Shipments
- 2. Enable Backorder Management
- 3. Default Delivery Type

## 1. Auto-Generate Shipments Preference

This preference tells aACE to automatically create shipments for items when an order is opened. It is only applicable in systems where inventory processes are enabled.

- 1. Navigate from Main Menu > Internal > Management Preferences > Shipping.
- 2. In the Shipment Automation section, mark the flag to Auto-generate shipments.

•	Management Preferences	
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ACE Management I		
Branding Order Entry Order Shipments	Billing Procurement Production Shipping	
<ul> <li>Returns reduce order item quantity. Select the</li> <li>Purchase Order Shipments</li> </ul>	is to reduce an order item's quantity when goods are returned, thereby preventing an automated replacement shipment.	
Incoming shipments default to purchase orde	r's Required By Date. this if you create receiving records for drop shipped products.	
Drop ship products to customers by default. Special order by default.	Select both DS and SO to force the user to choose one or the other – or neither – before activating the LIC.	
Serialized by default. Track by Manufacturer Lot by default.	Select both Serialized and Tracked by Mfr Lot to force the user to choose one or the other – or neither – before activating the LIC.	
Perishable by default. Update the Est Unit Cost to the greater of the A) Current inventory, or B) Purchasing activity within the last number		
Shipment Automation		
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Sync shipment date with delivery date.	shipments automatically generated once an order is opened.	
Sync shipment date with delivery date.  Auto-generate shipments. Select this to have	shipments automatically generated once an order is opened. this if your warebours uses shipments to manage the pick and pack process for pick up orders.	

#### **Related Automation Settings**

- Order Shipments Section
  - Returns Reduce Order Item Quantity When your customers return goods, aACE will reduce the quantity of items on the initial order, not generating a replacement shipment.
- Shipment Automation Section
  - Sync Shipment Date with Delivery Date aACE will update the estimated Delivery Date to reflect the date when your staff marks a shipment as Shipped or as Received.
  - Generate Shipments for Pick-Up Orders aACE will generate shipments for your pick-up orders to help manage your pick-and-pack processes.
  - Append Auto-Generated Items to Pending Shipments by Location When aACE sets up the shipment for one order, it can consolidate LICs from other orders for that same customer and location.

### 2. Enable Backorder Management Preference

This preference tells aACE to track whether orders for inventoried items have enough available product. If the demand exceeds available inventory, aACE displays a prompt to

split the item into two lines on the order — one that can be fulfilled immediately and one marked as backordered.

- 1. Navigate from Main Menu > Internal > Management Preferences > Order Entry.
- 2. In the Orders section, mark the flag to **Enable back order management**.

ACE Man	agement Pre	ferences	5			New ip Edit	🌶 Delete 💥	Print da	Actions
Branding	Order Entry Billi	ing Pro	curement	Production Shippi	ng				
Pending Order Label	Default Order Rec Type	Sales Order L	wout Drocks	uction Order Layout	Validations				
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Projects	Value (Dollars) y ship order items prior to their d	1,000.00 lesignated Ship Dat	Value e.	2	Validations Sales Rep is required.	30		ct when a le	ad is won.

As an example, if a sales order is placed for 10 items, but only 5 are available to be shipped, aACE will prompt the team member to choose whether the items can be split into two lines of 5. If this is acceptable, aACE splits the LICs and flags one as on backorder.

Later, when you receive an incoming shipment that includes the backordered items, aACE automatically generates an outgoing shipment for those items.

## 3. Default Delivery Type Preference

This preference applies during order entry. When an order is created, the Delivery Type field will auto-fill with the value you specify.

- 1. Navigate from Main Menu > Internal > Management Preferences > Order Entry > Edit.
- 2. In the Order Shipping section, specify a **Default Ship Type**.

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luote	SALES	Price-based	Derault	Shipment quantity must mate	
Allow multiple order	record types. Users can select "S	Sales", "Production", or custo	m order types when creating orders.	Order balance must be zen	
Prompt to open ord	er on save. Select this if orders ar	re typically opened immediate	elv after entry.		
Open / Closed (O/C	) by default. Select this to have p	ending and voided orders hid		Do not ship more than ord	ered.
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The standard ship types include:

- Pick Up You do not typically send out shipments to customers. Instead, they come to your premises and pick up their order.
- Complete Order shipments are only sent after all the needed items are available to ship.
- Partials OK If you only have some of the ordered items, aACE can prepare a shipment to send those items to the customer. The remaining items will be sent when they become available.

Note: During order entry, team members can change the current delivery type. However, after the order has been invoiced, they *cannot* change the delivery type.

# Gathering Log Data to Report on Shipping

You can gather additional insight on your shipping processes from the System Logs module. For example, you can search this module for the log entries generated each time a user marked a shipment as Shipped (or other key terms):

- 1. Navigate from Main Menu > System Admin > System Logs.
- 2. Enter the desired Log Date/Time range.

Note: You can use <u>search operators (https://aace6.knowledgeowl.com/help/using-search-operators-for-better-results)</u> to constrain the dates.

- 3. In the Module Record ID field, enter "ship".
- 4. In the Log Entry field, enter "shipped".
- 5. Run the search.

aACE returns all shipment records in that time frame that are marked as Shipped. The results note when each update happened and which team member made the update.