Overview of Order Entry Preferences

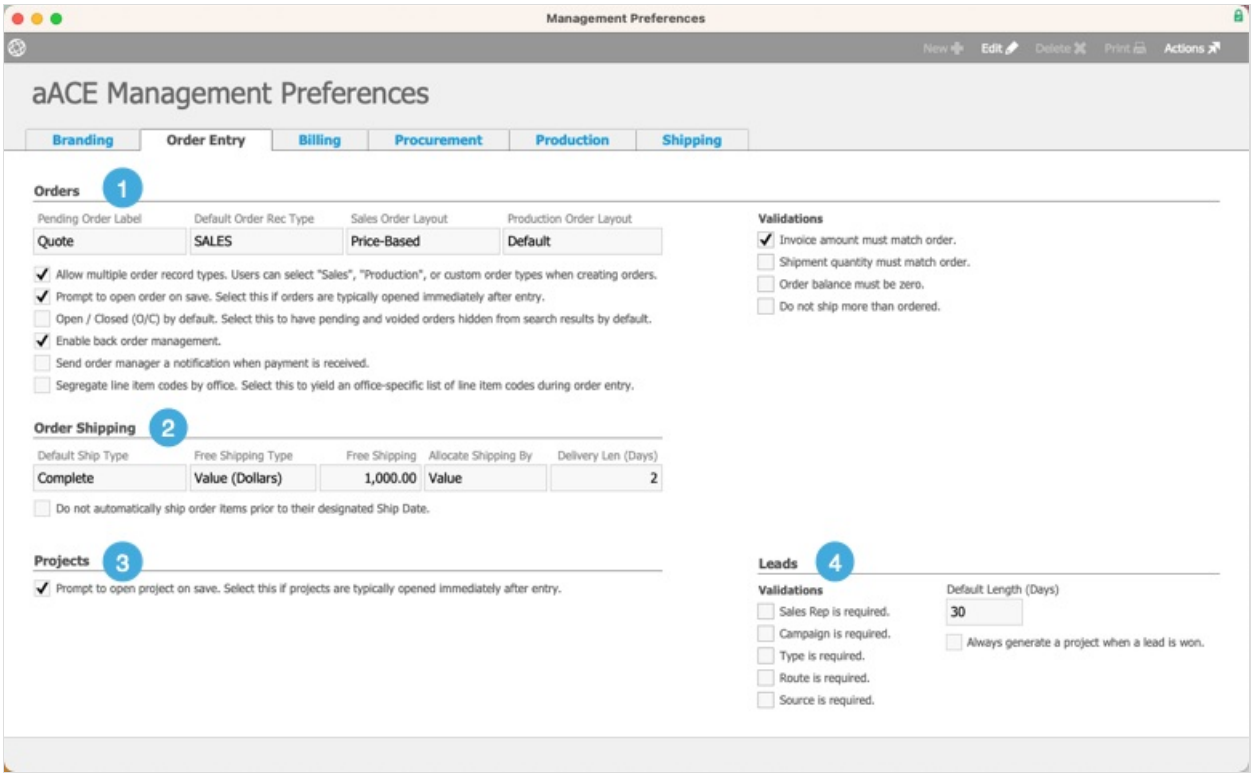
Last Modified on 10/17/2025 5:00 pm EDT

This guide provides information and best practices for configuring order entry preferences. It is intended for system administrators.

System administrators can set preferences to control various aspects of order entry, such as order management and the default order type for new orders. These configurations can affect order types, screen layouts, and other options.

To access these system preferences, navigate from Main Menu > Internal > Management Preferences > Order Entry.

Note: You must click Edit to update any of these settings and preferences. Also, in order to implement changes you've made, you must click Actions > Re-Login.



1. Orders and Validations

You can adjust preferences for order creation, order management, and requirements for opening an order.

Drop-Down Lists

The drop-down lists found in the Orders section affect certain aspects of order creation:

- Pending Order Label— Specifies how unopened orders are labeled in the Order record footer and in some records sent to customers
  Note: You can also configure new options in this drop-down list by clicking the Edit... option. For more information, read our guide on Working with Value Lists (https://aace6.knowledgeowl.com/help/working-with-value-lists).
- Default Order Rec Type — Specifies whether new orders should be sales, production, or service
  Note: The flag to 'Allow multiple order record types' enables your team members to select from multiple order types when they create new order records.
- Sales Order Layout — Determines the order template layout for new sales orders (see below (https://aace6.knowledgeowl.com/help/configuring-preferences-for-orders#ConfiguringOrderLayouts) for details)
- Production Order Layout — Determines the order template layout for new production orders (see below (https://aace6.knowledgeowl.com/help/configuring-preferences-for-orders#ConfiguringOrderLayouts) for details)

Flags

These flags also help you configure order workflows to best support team member productivity and company policy.

- Allow multiple order record types — Enables users to select the order record type when creating a new order
  Note: This flag overrides the Default Order Rec Type field described above.
- Prompt to open order on save — Configures aACE to display a message that requires users to select Open or Not Yet when an order is saved
  Note: If this flag is marked, but the order and LIC validations are not met, the system will *not* prompt users to open the order. Clearing this flag may be helpful for companies that wait for a response from the customer before opening an order.
- Open / Closed (O/C) by default — Filters out pending / voided orders from initial search results in the list view
- Enable back order management — Activates backorder management processes (https://aace6.knowledgeowl.com/help/configuring-backorder-management) for your system
- Send order manager a notification when payment is received
- Segregate line item codes by office — Constrains the list of LICs to office-specific items during an order entry

Validations

These validations designate calculations you can require aACE to make before it automatically opens an order record.

2. Order Shipping

Various factors of shipping an order can be customized. The drop-down lists in this section determine specific defaults for shipping orders:

- Default Ship Type (https://aace6.knowledgeowl.com/help/understanding-order-and-purchase-order-ship-types) — Specifies the initial setting for shipments on new order records
- Free Shipping Type — Specifies the criteria used for offering free shipping
- Free Shipping — Specifies the quantity required for offering free shipping
- Allocate Shipping By — Assigns the criteria for dividing the total shipping cost (http://aace6.knowledgeowl.com/help/understanding-order-shipping#ShippingCostAllocation) across invoices (e.g. when multiple orders are shipped to a single customer destination)
- Delivery Len (Days) — Defines the number of business days for calculating an estimated Ship Date
  Note: aACE estimates the Ship Date by adding the number of days you specify here to the order Start Date. You can also mark the 'Do not automatically ship order items prior to their designated Ship Date' flag to prevent aACE from generating shipment records before the Ship Date.

3. Projects

Mark the flag 'Prompt to open project on save' if projects in your organization should be opened as soon as team members create them.

4. Leads

You can control factors on new leads by configuring these settings:

- Default Length — Specifies the number of business days automatically added to the current date to generate the Estimated Close Date

- Always generate a project when a lead is won — Marking this flag automatically creates a project when leads are closed and flagged as 'Won'

Marking the validations can tell aACE what data is needed to automatically open a lead record.

Configuring Order Layouts

The Sales Order Layout and Production Order Layout fields noted above allow system administrators to configure the data displayed in the Order Items section of an order record. When you specify a layout here, aACE displays the corresponding label near the top of the order record's Management tab. This helps remind your team which layout is in use.

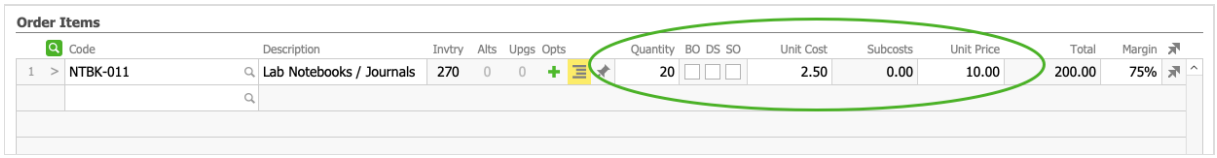
After you specify a new layout, you must re-login to aACE for the changes to take effect (i.e. Actions > Re-Login).

Note: You can also control order layouts using settings on aACE user groups. Settings in the User Group module (https://aace6.knowledgeowl.com/help/overview-of-user-groups) *take precedence* over the related settings here in the Management Preferences module.

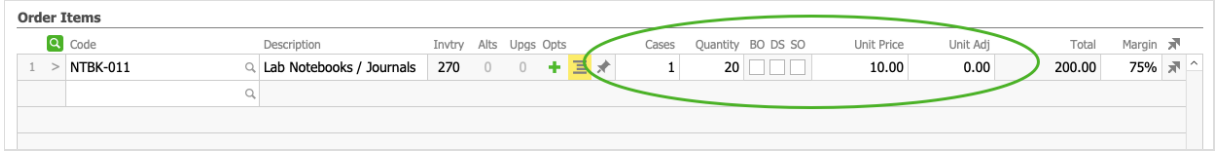
Sales Order Layouts

These layouts highlight various details that may be of most use to your sales team:

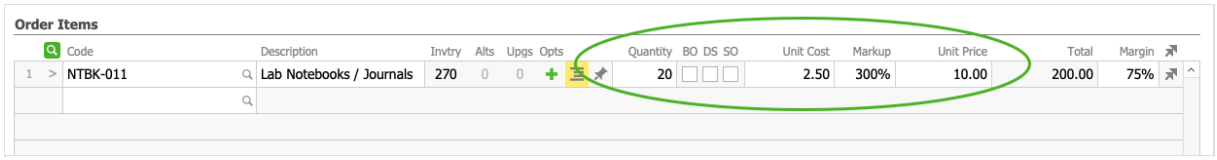
- Default



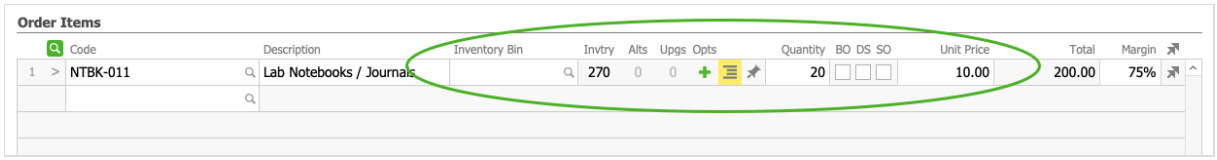
- Price-based



- Cost-based



- Inventory-based

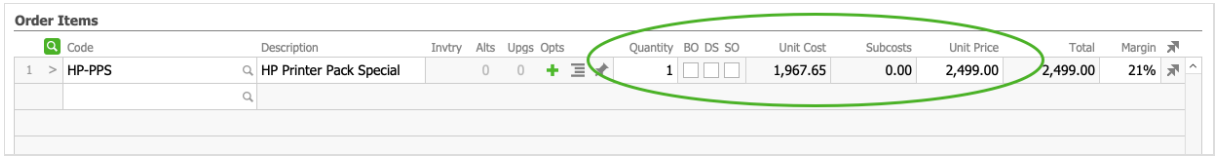


- Custom — This layout is intended for display purposes to help new aACE customers get a sense of fields they can use to configure their order entry layout. It is *not* intended for use in order entry.

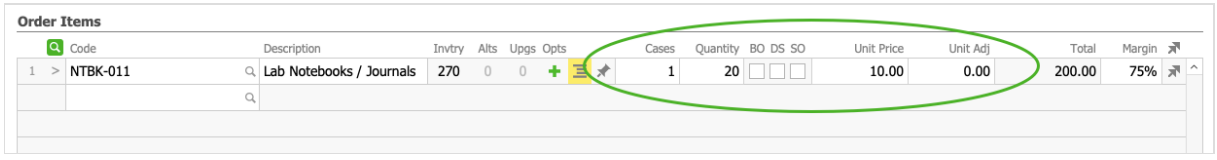
Production Order Layouts

The following layouts highlight various details that may be of most use to your warehouse team:

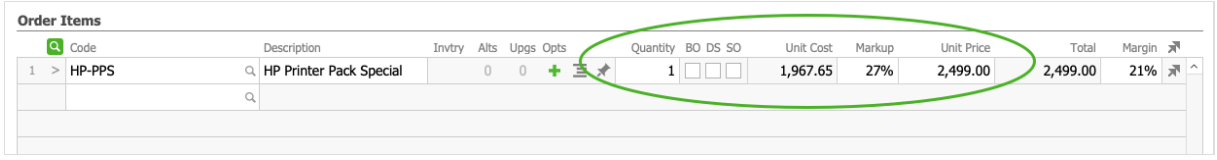
- Default



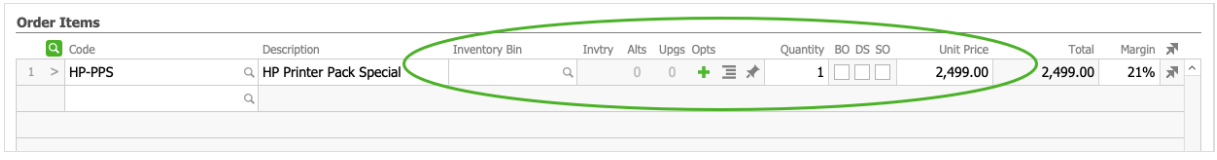
- Price-based



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- Inventory-based



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