Working with Management Preferences

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> This guide introduces the settings you can configure from the Management Preferences module. It is intended for system administrators.

The Management Preferences module gives you easy access to many of the most commonly used system settings. These preferences help you configure your aACE system to work most effectively with your company policies and workflows. The preferences are organized around the following six workflows. Key preferences are detailed here in this index, while more content is available in other guides.

Branding

You can configure the following branding options:

- Report Header — Click this area to upload your company logo or header image. This image will be displayed across the top of all reports, invoices, purchase orders, etc. Note: For individual offices, the header information (https://aace6.knowledgeowl.com/help/personalize-report-branding-by-office) is set at the Offices module.
- Business Settings — Specify the working hours for aACE to use in calculations for scheduling. Using the Region settings, you can specify defaults for postal formats.
- Report Footers — You can enter information in these sections that aACE will include on all orders, purchase orders, or invoices. This information is typically plain text. If you enter a URL though, then save the report as a PDF, that hyperlink will be active for users who access the PDF online.

Order Entry

These settings (https://aace6.knowledgeowl.com/help/configuring-order-entry-preferences) govern the workflow when your team members are working with customer orders.

Billing

These settings (https://aace6.knowledgeowl.com/help/configuring-billing-preferences) control aACE automation for invoices and deposits.

Procurement

These settings help you manage [purchase order automation](https://aace6.knowledgeowl.com/help/order-procurement-automation).

Production

These settings help you [manage your fulfillment workflows](https://aace6.knowledgeowl.com/help/overview-of-fulfillment-preferences):

- Jobs — Controls when job assignment notices are sent and how jobs are scheduled.
- Job Automation — Determines when jobs are opened / closed and how costs are applied.
- Tasks — Handles task notifications
- Task Automation — Manages task opening statuses.
- Inventory — Controls the assignment of inventory costs to jobs.
- Time — Tracks time entries from call dialogs.

Shipping

These settings help you [manage shipment handling](https://aace6.knowledgeowl.com/help/overview-of-shipping-preferences) for both incoming and outgoing deliveries, including:

- Order Shipments > 'Returns reduce order item quantity' preference — Determines how [customer returns are processed](http://aace6.knowledgeowl.com/help/processing-customer-returns) in your company:
  - Flag *cleared* — aACE will *not* automatically reduce the order item quantities. Instead, the system assumes that additional product will be sent to replace the returned items. If the 'Auto-generate shipments' flag is also marked, aACE will automatically generate a replacement shipment when the returned goods are received.
  - Flag *marked* — aACE will automatically update the order to reduce the item quantities equal to the returned product. The system assumes that additional product will *not* be sent. No automatic replacement shipments will be generated.
- Purchase Order Shipments — Controls aspects of incoming shipments from vendors.
- Line Item Code Defaults — Sets various defaults for *all* products with one-click.

- Shipment Automation — Coordinates shipment and delivery dates and automates aspects of outgoing shipments to customers.