

Discovery Training: Sales Orders

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This guide walks you through tasks for learning how to work with sales orders in aACE. It is intended for new users in the Discovery process.

Introduction

This Discovery Training guide introduces sales orders and how aACE helps automate sales processes. It will reinforce what you learned in the last training guide, while building on your knowledge of transactions. This guide will not focus on basic steps or knowledge. It presumes you are familiar and comfortable with the foundational topics already covered:

- [Discovery Training: Basics](https://aace6.knowledgeowl.com/help/discovery-training-basics) (<https://aace6.knowledgeowl.com/help/discovery-training-basics>)
- [Discovery Training: Purchase Orders](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) (<https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders>)

While aACE has [many types of orders](https://aace6.knowledgeowl.com/help/overview-of-orders) (<https://aace6.knowledgeowl.com/help/overview-of-orders>), this guide will concentrate on sales orders. You can check out our [webinar on sales orders](https://showme.aacesoft.net?id=10063) (<https://showme.aacesoft.net?id=10063>) to learn about the different order types and more.

For this training, you will be working with the Contacts module and the Orders module. You will first create some contact records. One of these should be connected to shipping responsibilities. Another should be linked to A/P tasks. This is to highlight how aACE allows you to specify a shipping contact that is different from the Bill To contact.

Creating Contacts from the Companies Module

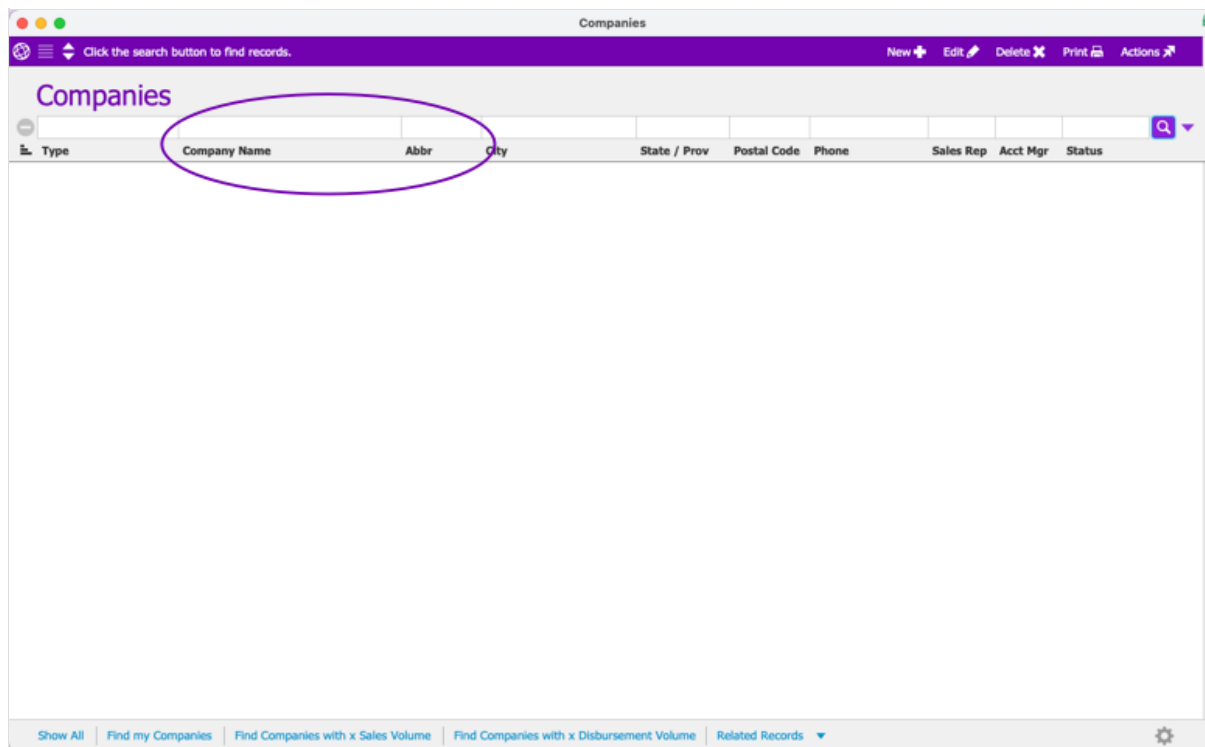
In your previous training with the Companies module, you created new customer and vendor companies. We will be working with your customer company. We'll add multiple contacts to the company to show how aACE helps you send the right information to the right person.

Adding Communication Methods to a Company

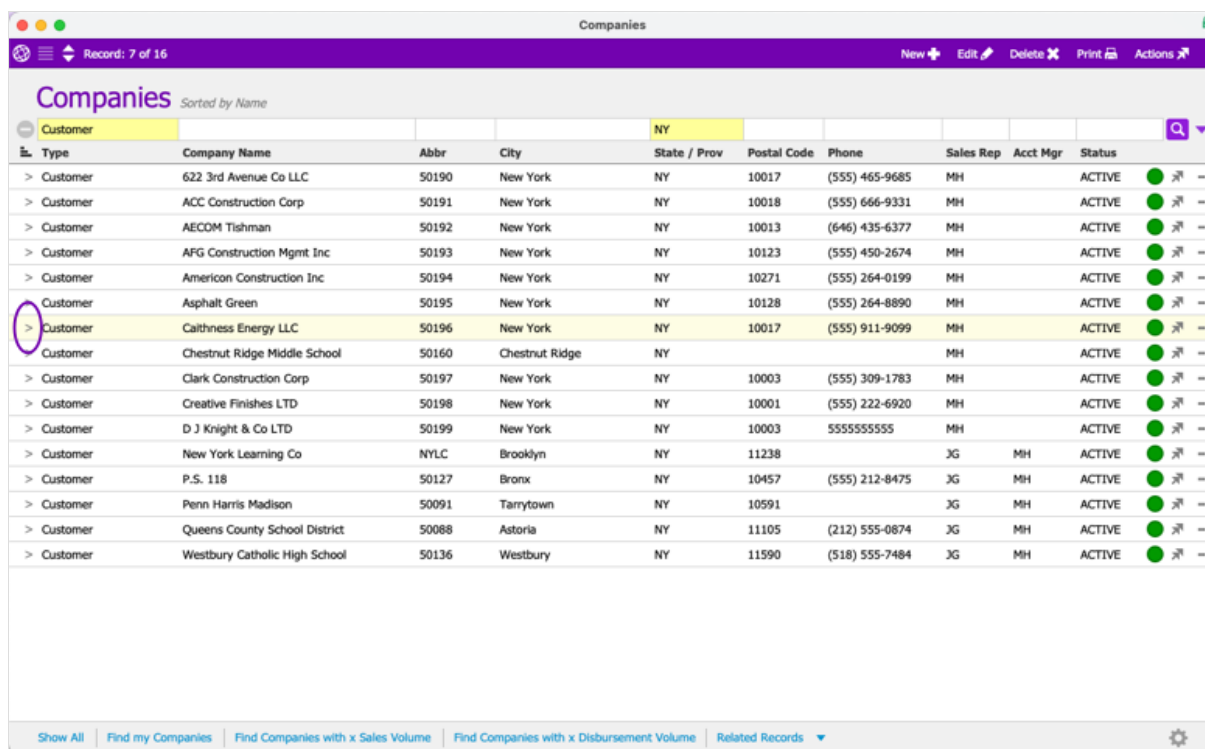
To begin, we'll first update the general information for communicating with this company. Keeping track of a customer's communication methods is vital for maintaining a good relationship. We will locate your customer company record and update it to include general

contact methods.

1. From the Main Menu, click **CRM & Sales**, then click **Companies**. Use the [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (<https://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) bar to search for the **Company Name** or **Abbreviation** of your customer company.



2. Click your customer company's **Go To** arrow (>).



3. From your customer company's detail view, click **Edit**.

The screenshot shows the 'Companies' detail view for 'Caithness Energy LLC (50196)'. The status is 'ACTIVE'. The top toolbar includes buttons for 'New', 'Edit' (circled in purple), 'Delete', 'Print', and 'Actions'. Below the toolbar are tabs for 'Company Details', 'Sales & Marketing', 'Customer Details', 'Vendor Details', and 'Finance & Accounting'. The 'Company Info' section includes fields for Type (Customer), Office Address (565 Khrystall Ave # 29), City (New York), State (NY), Postal Code (10017), Country (United States), and Postal Format (American). The 'Contact Info' section includes fields for Phone, Alt Phone, Fax, Phone / Fax Format, Email, Web Address, and Email Format. The 'Other Info' section includes fields for Group (Construction), Subgroup (Utilities), Parent Company, Referral Company, Referral Contact, Referral Team Member, and Other Referral. A 'Contacts (1)' table is shown below the tabs, with columns for Contact Name, Title, Phone, Default, and Status. The bottom of the form has a 'Limit-To Office' field and a settings icon.

4. In the Contact Info section, enter real or hypothetical contact information, including a phone number, an email address, and a website URL. Click **Save**.

The screenshot shows the same 'Companies' detail view for 'Caithness Energy LLC (50196)'. The 'Contact Info' section is now populated with the following information: Phone: (555) 911-9099, Alt Phone: (555) 911-0990, Fax: (555) 911-0909, Phone / Fax Format: (###) ###-####, Email: info@caithnessenergy.com, Web Address: www.caithnessenergy.com, and Email Format: J.Q.Public@caithnessenergy.com. The 'Other Info' section remains the same. The 'Contacts (1)' table is still empty. The bottom of the form has a 'Limit-To Office' field, a 'Cancel' button, and a 'Save' button (highlighted in blue).

Note: The Phone / Fax Format and Email Format fields allow you to configure aACE so the system can help you enter data more consistently. You can specify the [default formatting for postal and phone number fields](https://aace6.knowledgeowl.com/help/changing-the-default-formatting-for-postal-and-phone-number-fields) (<https://aace6.knowledgeowl.com/help/changing-the-default-formatting-for-postal-and-phone-number-fields>).

[postal-and-phone-formats](#)). For details on how to use the Email Format field, click the Info icon (?).

Creating a New Contact for a Company

In tandem with the Companies module, the Contacts module helps you manage information about the individuals you interact with at an organization. You can link multiple contacts to a company. You will create a new contact for this customer directly from the company record.

1. From your customer company record, be sure the **Contacts** tab is displayed. In the Contacts section, click the **Add icon** (+).

The screenshot displays the 'Company: Caithness Energy LLC (50196)' record in the aACE software. The 'Contacts' tab is highlighted and circled in red. Below the tab, a table lists two contacts:

Name	Title	Phone	Default	Status
> Belinda Jamison	Accounts Payable Specialist	(555) 911-0900	<input checked="" type="checkbox"/>	Active
> Jim Bishop	Warehouse Manager	(555) 911-9099	<input type="checkbox"/>	Active

This opens the Contacts module with a new contact record ready to edit. The record is automatically linked to the customer company record. At the new contact record, note the following details:

- A. The Key Contact flag designates a contact as a focal point for communications with the company. aACE will bold a key contact's name in lists of contacts. You can mark this flag for multiple contacts within an organization.
- B. aACE autofills some information from the company record, using the address and communication methods you entered. This data is noted by italicized text.

Contacts

Record: 1 of 1

New Edit Delete Print Actions

Contact: Salut First Name MI Last Name Suffi Initials PENDING

Contact Details Sales & Marketing Notices Tasks Emails Docs

Company Info A Key Contact ☐

Photo Title

Department

Company > Location

Caithness Energy LLC

Address

565 Khrystall Ave # 29 B

City State / Prov Postal Code

New York NY 10017

Country Postal Format

United States American

Contact Info

Direct Phone Office Phone Ext

(555) 911-9099

Mobile Phone Home / Other

Fax

(555) 911-0909

Phone / Fax Format Primary

(###) ###-####

Email

Alt Email

Web Address

www.caithnessenergy.com

Best Way to Reach

Alt Contact Types

Type	Value	

Related Contacts (1) [Linked Companies](#) [Lists](#)

Contact Name	Title	Department	Location

Cancel Save

2. Enter data for **First Name**, **Last Name**, **Title**, and **Department**.

You can use an actual contact from your customer company or enter hypothetical data. For some of the following demonstrations, we suggest creating a contact related to shipping workflows (e.g. Warehouse Manager, etc).

□

3. Click **Save**.

aACE validates the data, then prompts you to activate the contact.

4. Click **Activate**.

aACE updates the record status to Active.

5. Close the Contacts module and return to the Companies module.

aACE lists the new contact on the Contacts tab.

Company: Caithness Energy LLC (50196) ACTIVE

Company Info

Type: Customer

Office Address: 565 Khrystall Ave # 29

City: New York, State / Prov: NY, Postal Code: 10017

Country: United States, Postal Format: American

Contact Info

Phone: (555) 911-9099, Alt Phone: (555) 911-9099

Fax: (555) 911-0909, Phone / Fax Format: (###) ###-####

Email: info@caithnessenergy.com

Web Address: www.caithnessenergy.com

Email Format (using "John Q Public"): j.q.public@caithnessenergy.com

Other Info

Group: Construction, Subgroup: Utilities

Parent Company >

Referral Company >

Referral Contact >

Referral Team Member > Other Referral

Contacts (1)

Contact Name	Title	Phone	Default	Status
Jim S Bishop	Warehouse Manager	(555) 911-9099	<input type="checkbox"/>	ACTIVE

6. Mark the flag to identify your new contact as the **Default**.

This flag designates the primary contact for this company. When you link a company to another record (e.g. a sales order), aACE will autofill this contact's information. You can mark only one contact as the Default.

Company: Caithness Energy LLC (50196) ACTIVE

Company Info

Type: Customer

Office Address: 565 Khrystall Ave # 29

City: New York, State / Prov: NY, Postal Code: 10017

Country: United States, Postal Format: American

Contact Info

Phone: (555) 911-9099, Alt Phone: (555) 911-9099

Fax: (555) 911-0909, Phone / Fax Format: (###) ###-####

Email: info@caithnessenergy.com

Web Address: www.caithnessenergy.com

Email Format (using "John Q Public"): j.q.public@caithnessenergy.com

Other Info

Group: Construction, Subgroup: Utilities

Parent Company >

Referral Company >

Referral Contact >

Referral Team Member > Other Referral

Contacts (1)

Contact Name	Title	Phone	Default	Status
Jim S Bishop	Warehouse Manager	(555) 911-9099	<input checked="" type="checkbox"/>	ACTIVE

7. Repeat these steps to create and activate a second contact. We suggest creating a contact related to billing workflows (e.g. Accounts Payable Specialist, etc). Then update

the Default assignment so your A/P Department contact is the default.

The screenshot shows the 'Companies' module in a web application. The main header indicates 'Record: 2 of 2'. The company name is 'Caithness Energy LLC (50196)' and its status is 'ACTIVE'. The 'Contacts' tab is selected, showing a list of contacts. The contact 'Belinda Jamison' is highlighted, and the 'Default' checkbox is checked, indicating she is the default contact. A purple circle highlights the 'Default' checkbox and the 'Status' column.

Contact Name	Title	Phone	Default	Status
> Jim Bishop	Warehouse Manager	(555) 911-9099	<input type="checkbox"/>	●
> Belinda Jamison	Accounts Payable Specialist	(555) 911-0900	<input checked="" type="checkbox"/>	●

Note: Only one contact can be flagged as the Default. Typically this is the person who other aACE users would reach out to for answers to questions.

Orders

The Orders module allows you to view, manage, and fulfill orders. It is one of the most important screens in your aACE system. aACE includes functionality for multiple types of orders (i.e. sales, production, and service). These three types prioritize certain features that are most helpful for certain businesses. This training guide will focus on sales orders. The sales order type easily demonstrates key features that the other order types share.

Creating a Sales Order

Creating a new sales order involves the same general steps for creating records that you've practiced so far. As we work with sales orders, we will be using line item codes (LICs) from the sample data in your Discovery system.

1. From the Main Menu, click **Order Management**, then **Orders**. At the Orders module header, click **New**.

This displays a popup menu where you can select from the various Order record types.

□

2. Click **Sales**.

This creates a new sales order record. The Bill To company selection popup is displayed and required fields are shaded pink.

The screenshot displays the 'Orders' application window. At the top, the record number is 'Record: 1 of 1'. The main header shows 'Order: 60015' with a 'Title' field and a date of '07/04/23'. The status is 'PENDING'. Below the header, there are tabs for 'Sales Order', 'Management', and 'Job Costs & Approvals'. The 'Sales Order' tab is active, showing fields for 'Bill To' and 'Ship To'. The 'Bill To' section includes fields for 'Customer PO #', 'Rate Card', 'Disc %', and 'Billing Terms'. The 'Ship To' section includes fields for 'Ship Type', 'Ship Date', 'Inventory Bin', and 'Shipping Terms'. A 'Comments & Next Steps' section is also visible. A 'Bill To' company selection popup is open, showing fields for 'Company', 'Addresses', 'Contact', 'Address Title', 'Address', 'City', 'State or Prov', 'Postal Code', 'Country', and 'Postal Format'. The 'Company' field is highlighted in pink. Below the popup, there is a table with columns: 'Alts', 'Upps', 'Opts', 'Cases', 'Quantity', 'BO', 'DS', 'SO', 'Unit Price', 'Unit Adj', 'Total', and 'Margin'. At the bottom, there are tabs for 'Sales', 'Billing', 'Fulfillment', and 'Shipping'. The 'Sales' tab is active, showing fields for 'Order Type', 'Payment Account', 'Recurring Transaction', 'Currency', and 'Exchange Rate'. A summary table at the bottom right shows: Subtotal (0.00), Adjustment (0.00), Total (0.00), Shipping (0.00), Tax (0.00), and Grand Total (0.00). The 'Tax' field is marked as '(Required)'. The bottom of the window has a footer with 'Dept: AI', 'Asgn By: DJ', 'Asgn To: DJ', and 'Tracking Status'.

- In the Bill To company selection popup, begin typing the name of the customer company you created to activate aACE type-ahead, then press **ENTER**.
aACE populates the fields with the address and Default contact from the company record.

The screenshot displays the 'Orders' management interface for aACE Software. At the top, the order number '60015' and customer name 'Caithness Energy LLC' are shown, along with the date '07/04/23' and status 'PENDING'. The interface includes tabs for 'Sales Order', 'Management', and 'Job Costs & Approvals'. The 'Bill To' and 'Ship To' fields are circled in red, indicating they are the focus of the instructions. The 'Bill To' field contains the address: 'Caithness Energy LLC, Jim Bishop, 565 Khrystall Ave # 29, New York, NY 10017'. The 'Ship To' field also contains the same address. The 'Comments & Next Steps' section is empty. The 'Order Items' table is empty. The bottom section shows the 'Sales' tab selected, with fields for 'Order Type', 'Payment Account', 'Recurring Transaction', 'Currency', and 'Exchange Rate'. The 'Grand Total' is displayed as '0.00'.

Note: The Ship To address initially matches the Bill To address. By default, aACE uses the primary address and the Default contact for both Bill To and Ship To sections.

4. Click the **Bill To** field again.

This displays the Bill To popup.

5. Click the **Contact** field, enter the initials for the contact you created related to billing workflows, then press ENTER.

This updates the contact for the billing information, but leaves the shipping contact unchanged.

Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To
 Caithness Energy LLC
 Belinda M Masterson
 365 Kew-Forest Ave # 29
 New York, NY 10017


Ship To
 Caithness Energy LLC
 Jim Bishop
 365 Kew-Forest Ave # 29
 New York, NY 10017

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin

Summary:
 Subtotal: 0.00 0%
 Adjustment: 0.00
 Total: 0.00 0%
 Shipping: 0.00 0%
 Tax: NYC 0.00 0%
 Grand Total: 0.00 0%

Note: You can also specify when certain contacts should be used by entering more information on a company record's Contacts or Locations tabs.

- In the Order Items section, use the LIC selector () to locate and select **TBLT-7**, then save the selection.

This adds the LIC to the Order Items list.

Orders

Record: 1 of 1

New Edit Delete Print Actions

Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

Sales Order Management Job Costs & Approvals Notices Tasks Emails Docs

Bill To **Ship To** **End Customer** **Comments & Next Steps**

Bill To > Caithness Energy LLC
Belinda M Masterson
565 Khrystall Ave # 29
New York, NY 10017

Customer PO #
Rate Card > Disc %
Billing Terms
Net 30

Ship To > Caithness Energy LLC
Jim Bishop
565 Khrystall Ave # 29
New York, NY 10017

Blind ☐ Ship Type Complete Ship Date 07/06/23
Inventory Bin
Shipping Terms

Description Additional Info

Next Step Next Step Date

Order Items

	Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1	TBLT-7	Student Tablet, 7" Screen	170	2	7	+		1				481.25	0.00	481.25	43%

Subtotal 0.00 0%
Adjustment 0.00
Total 0.00 0%
Shipping 0.00 0.00
Tax NYC 0.00
Grand Total 0.00 0%

Sales Billing Fulfillment Shipping

Order Type Sales Payment Account Recurring Transaction > Currency USD Exchange Rate 1

Dept: AI Assign By: DJ Assign To: DJ Tracking Status

Cancel Save

7. Hover your mouse cursor over the order item's **Unit Price** field.

This displays a calculation tooltip that summarizes how the cost or price of an item was calculated. You can also review the relevant calculations this way in the Unit Adj, Total, and Margin fields.

Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To: Caithness Energy LLC, Belinda M Masterson, 565 Khrystall Ave # 29, New York, NY 10017. **Ship To:** Caithness Energy LLC, Jim Bishop, 565 Khrystall Ave # 29, New York, NY 10017. **Ship Date:** 07/06/23. **Billing Terms:** Net 30.

Order Items:

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SP	Unit Price	Unit Adj	Total	Margin
1	TBLT-7	Student Tablet, 7" Screen	170	2	7		1				481.25	0.00	481.25	43%

Subtotal: 0.00 **Adjustment:** 0.00 **Total:** 0.00 **Shipping:** 0.00 **Tax:** 0.00 **Grand Total:** 0.00

8. Click the blue highlighted number in the **Alts** column.

This displays the Options Selector where you can choose an alternate LIC. Alternates replace the item currently listed on the order. [Alternates](https://aace6.knowledgeowl.com/help/working-with-alts-upgrades-and-options) (<https://aace6.knowledgeowl.com/help/working-with-alts-upgrades-and-options>) can be useful when there is insufficient inventory for the initial LIC.

Order: 60015 Caithness Energy LLC 07/04/23 PENDING

Bill To
Caithness Energy LLC
Belinda M Masterson
565 Khrystall Ave # 29
New York, NY 10017

Ship To
Caithness Energy LLC
Jim Bishop
565 Khrystall Ave # 29
New York, NY 10017

Order Items

Code	Description	Qty	Upps	Options	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > TBLT-7	Student Tablet, 7" Screen	179	2			1				481.25	0.00	481.25	43%

Subtotal 0.00 0%
Adjustment 0.00 0%
Total 0.00 0%
Shipping 0.00 0.00
Tax NYC 0.00
Grand Total 0.00 0%

9. In the Options Selector, select **TBLT-8** and click **Save**.
aACE removes the TBLT-7 LIC and enters the TBLT-8 LIC, updating the pricing.

Options

Type	Line Item Code	Qty	Cost	Avail Invtry
Technology	TBLT-9 Student Tablet, 9" Screen	1	399.99	640

Displaying 2 of 2 found

Selected Options

Line Item Code
TBLT-8 Student Tablet, 8" Screen

Select All >> << Remove All

10. In the Order Items section again, click the blue highlighted number in the **Upps** column.

This displays the Options Selector where you can choose an upgrade LIC. Upgrades are *added* to the order as child items under the initial item. [Upgrades](https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) (<https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options>) can be used to add value on a customer order.

Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To: Caithness Energy LLC
Belinda M Masterson
565 Khrystall Ave # 29
New York, NY 10017

Ship To: Caithness Energy LLC
Jim Bishop
565 Khrystall Ave # 29
New York, NY 10017

Order Items:

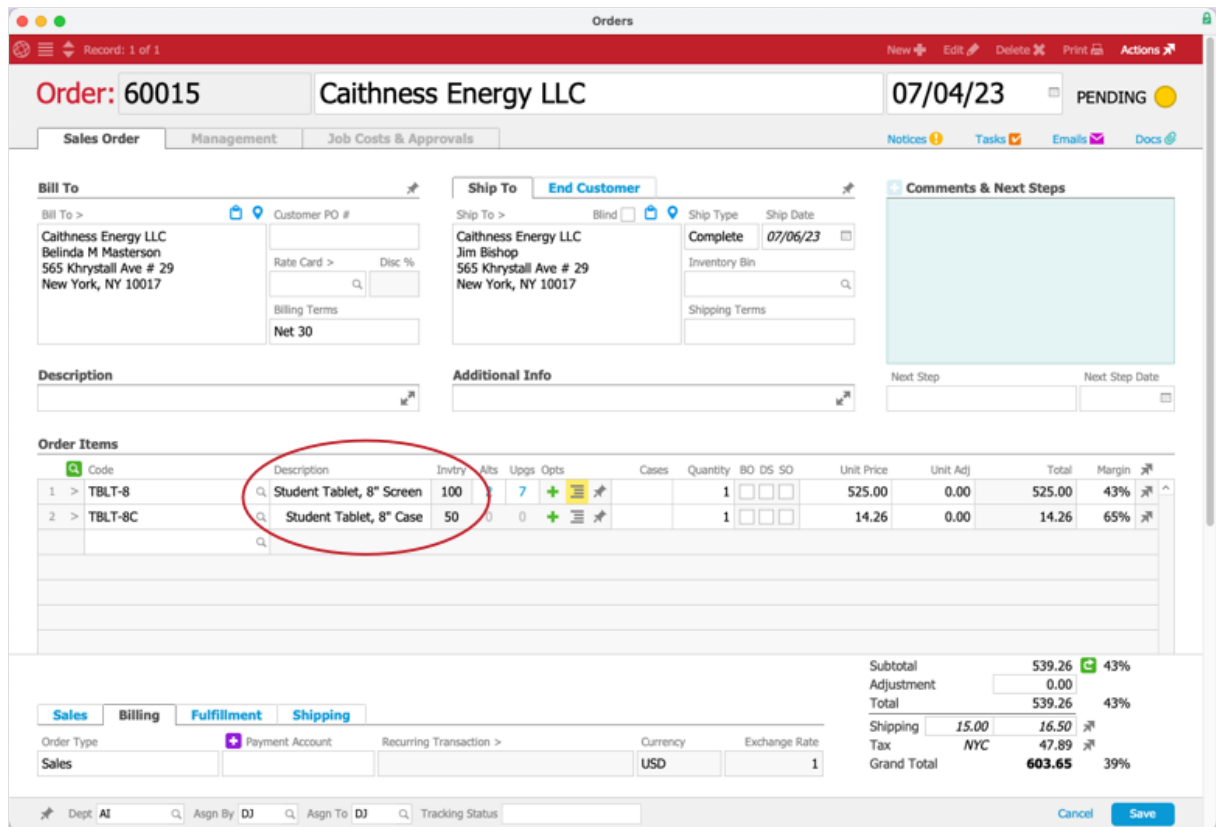
Code	Description	Invtry	Alt	Options	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > TBLT-8	Student Tablet, 8" Screen	100	2	7		1				525.00	0.00	525.00	43%

Comments & Next Steps:

Subtotal: 0.00 **0%**
Adjustment: 0.00
Total: 0.00 **0%**
Shipping: 0.00 **0%**
Tax: NYC 0.00
Grand Total: 0.00 **0%**

11. In the Options Selector, select **TBLT-8C** and click **Save**.

This adds the new LIC under the initial TBLT-8 line, with the Description indented. The TBLT-8 becomes a 'parent' item, while the TBLT-8C becomes a 'child' item.



Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To
 Caithness Energy LLC
 Belinda M Masterson
 565 Khrystall Ave # 29
 New York, NY 10017
 Rate Card > Disc %
 Billing Terms
 Net 30

Ship To **End Customer**
 Caithness Energy LLC
 Jim Bishop
 565 Khrystall Ave # 29
 New York, NY 10017
 Ship Type: Complete
 Ship Date: 07/06/23
 Inventory Bin
 Shipping Terms

Comments & Next Steps

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > TBLT-8	Student Tablet, 8" Screen	100	7	+			1				525.00	0.00	525.00	43%
2 > TBLT-8C	Student Tablet, 8" Case	50	0	0	+		1				14.26	0.00	14.26	65%

Summary:
 Subtotal: 539.26 43%
 Adjustment: 0.00
 Total: 539.26 43%
 Shipping: 15.00 16.50
 Tax: NYC 47.89
 Grand Total: **603.65** 39%

Order Type: Sales **Payment Account:** **Recurring Transaction >** **Currency:** USD **Exchange Rate:** 1

Buttons: Sales, Billing, Fulfillment, Shipping, Cancel, Save

Note: You can also have aACE automatically [add upgrade items by configuring the LIC record](https://aace6.knowledgeowl.com/help/working-with-alts-upgrades-and-options) (<https://aace6.knowledgeowl.com/help/working-with-alts-upgrades-and-options>).

12. From the order record, click **Save**.

aACE runs validations and prompts you to open the order.

13. Click **Not Yet**.

aACE keeps the order in Pending status.

14. In the header bar, click **Print**, then **Print this View**.


This displays a print preview of the order. Because the order is in Pending status, the order printout displays 'QUOTE' in the top-right corner.

PRINT: Orders

Pages: 1 Total

Save as Excel Save as PDF Print Page Setup

Layout: ORD: Det...ales Print View As: Exit Preview



aACME Education Solutions
1238 Broadway, New York, NY 10001 (555) 418-9777

QUOTE
Calthness Energy LLC

Salesperson Mara Harvey
(555) 456-3993
mara.harvey@aacmesolutions.com

Order # 60015
Date 07/04/23
Delivery 07/06/23
Billing Terms Net 30

Bill To
Calthness Energy LLC
Belinda M Masterson
565 Khrystall Ave # 29
New York, NY 10017

Ship To
Calthness Energy LLC
Jim S Bishop
565 Khrystall Ave # 29
New York, NY 10017

Phone
(555) 911-9099

Order Items

Line	Code	Description	Quantity	Unit Price	Item Total
1	TBLT-S	Student Tablet, 8" Screen A larger version of the Student Tablet.	1	525.00	525.00
2	TBLT-PC	Student Tablet, 8" Case	1	14.26	14.26
Subtotal					539.26
Shipping					16.50
Tax					47.89
Grand Total					603.65

Signature _____ **Date** _____


15. Close the print preview.
16. In the order record header bar, click **Actions**, then **Open**.
aACE runs validations and prompts you to open the order.
17. Click **Open** again.
aACE moves the order to Open status.
18. In the header bar again, click **Print**, then **Print this View** again.
This displays the preview again. Because the order is now in Open status, the order printout displays 'SALES ORDER' in the top-right corner. An Open order in aACE means the record is legitimate, in process, and can only be edited in limited ways.

PRINT: Orders

Pages: 1 Total

Save as Excel Save as PDF Print Page Setup

Layout: ORD: Det...ales Print View As: Exit Preview



aACME Education Solutions
1238 Broadway, New York, NY 10001 (555) 418-9777

SALES ORDER
Calthness Energy LLC

Salesperson Mara Harvey
(555) 456-3993
mara.harvey@aacmesolutions.com

Order # 60015
Date 07/04/23
Delivery 07/06/23
Billing Terms Net 30

Bill To

Calthness Energy LLC
Belinda M Masterson
565 Khrystall Ave # 29
New York, NY 10017

Ship To

Calthness Energy LLC
Jim S Bishop
565 Khrystall Ave # 29
New York, NY 10017

Phone
(555) 911-9099

Order Items

Line	Code	Description	Quantity	Unit Price	Item Total
1	TBLT-S	Student Tablet, 8" Screen A larger version of the Student Tablet.	1	525.00	525.00
2	TBLT-6C	Student Tablet, 8" Case	1	14.26	14.26
Subtotal					539.26
Shipping					16.50
Tax					47.89
Grand Total					603.65
Payments					0.00
Payment Due					603.65

Close the print preview. Take note of your customer company. In the next phase, you will continue processing this customer's order, using the Shipping Log module.

Shipping a Sales Order

On an order's detail view, aACE provides multiple tabs for viewing progress and [managing the order](https://aace6.knowledgeowl.com/help/overview-of-orders) (<https://aace6.knowledgeowl.com/help/overview-of-orders>). For example, clicking the Management tab initially displays the Overview tab.

[illegible]

The Overview tab for a sales order is similar to the Overview tab for [managing a PO \(https://aace6.knowledgeowl.com/help/working-with-purchase-orders\)](https://aace6.knowledgeowl.com/help/working-with-purchase-orders). It provides a good deal of information about shipments and invoices. In this training guide, you'll work more with the Shipping & Receiving tab. Invoicing will be addressed in a later training guide.

Basic Shipping & Receiving

The Shipping and Receiving tab shows additional details about progress on an order's shipment(s). Note: Your Discovery system is configured to automatically generate shipments for open orders. This setting can be changed in [aACE's Shipping preferences](https://aace6.knowledgeowl.com/help/shipping-preferences) (<https://aace6.knowledgeowl.com/help/shipping-preferences>).

Let's fast-forward to when your fulfillment staff need to prepare the ordered product for shipping. If you have any aACE windows open, feel free to close them first.

1. From the Main Menu, click **Order Management**, then **Shipping Log**. This displays the Shipping Log module list view.

Shipping Log

Record: 5 of 5

New

Edit

Delete

Print

Actions

Shipments

<

2. In the Shipments section, click the **Go-To** arrow (>) for the shipment to your customer. This shows the detail view for the outgoing shipment. For this training, we will process the shipment as-is.

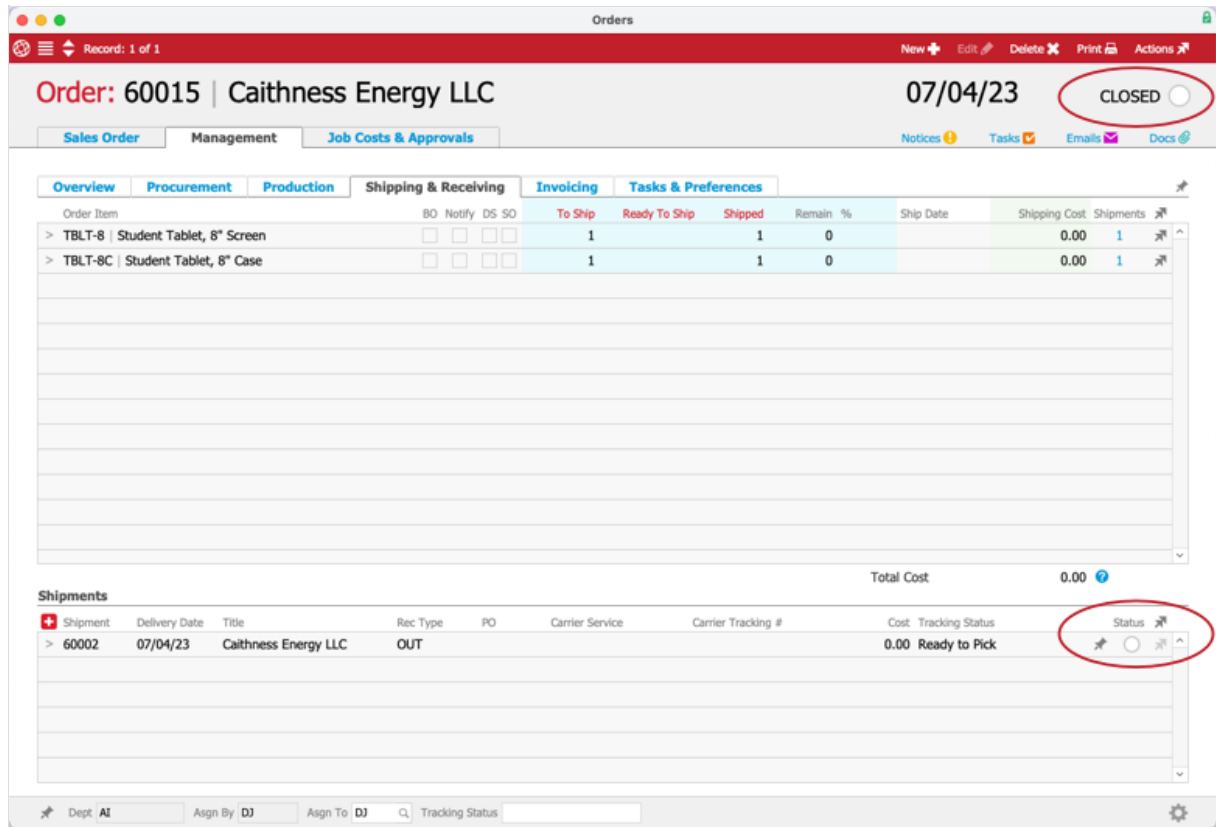
[illegible]

3. In the header bar, click **Actions** and **Ship**.
aACE runs validations and prompts you to mark the shipment as Shipped.
4. Click **Yes**.

aACE processes the shipment and updates the status to Shipped.

5. Close the Shipping Log module and return to the Order module.

The Shipping & Receiving tab also shows that the shipment is Shipped and the order as Closed.



The screenshot displays the aACE Orders module interface. At the top, the order number 60015 and customer name Caithness Energy LLC are shown, along with the date 07/04/23 and a 'CLOSED' status indicator. The 'Shipping & Receiving' tab is selected, showing a table of items with columns for 'To Ship', 'Ready To Ship', 'Shipped', and 'Remain %'. Two items are listed: 'TBLT-8 Student Tablet, 8\"

Order Item	BO	Notify	DS	SO	To Ship	Ready To Ship	Shipped	Remain %	Ship Date	Shipping Cost	Shipments
> TBLT-8 Student Tablet, 8" Screen					1		1	0		0.00	1
> TBLT-8C Student Tablet, 8" Case					1		1	0		0.00	1

Below the items table, the 'Shipments' section shows a single shipment with details: Shipment 60002, Delivery Date 07/04/23, Title Caithness Energy LLC, Rec Type OUT, Carrier Service, Carrier Tracking #, Cost 0.00, Tracking Status Ready to Pick, and Status Ready to Pick. The status field is circled in red.

Note: aACE system preferences can help you automate standard tasks. For example, your Discovery system is configured to automatically generate invoices and to close orders. When you mark a shipment as Shipped, aACE auto-generates the invoice. This invoice number is noted on the shipment record's footer. When an order has an invoice in Open status and has no remaining product to ship, aACE auto-closes the order. You can configure these features using [aACE's Billing preferences](https://aace6.knowledgeowl.com/help/configuring-billing-preferences)

(<https://aace6.knowledgeowl.com/help/configuring-billing-preferences>).

Alternate Shipping Methods

aACE supports other workflows for delivering product to your customers.

Drop Shipping

[Drop shipping \(DS\)](https://aace6.knowledgeowl.com/help/understanding-drop-shipping) (<https://aace6.knowledgeowl.com/help/understanding-drop-shipping>) is typically used to send product from a vendor directly to your customer. aACE generates and sends a PO to the vendor, with the customer's address as the Ship To address. Your business basically handles

the purchasing tasks for the customer.

To demonstrate this functionality, we'll run through the process for creating a sales order again, focusing on the steps for flagging items as drop shipped. Then we'll process the PO so the sales order progress can continue.

1. At the Orders module, click **New > Sales**.
2. At the Bill To company selection popup, enter your customer company.

On the order record, note that the Ship To section includes a flag labeled **Blind**. You can read more about blind shipping in the [Overview of Orders](#)

(https://aace6.knowledgeowl.com/help/overview-of-orders#OverviewOrders_BillToShipTo) guide.

The screenshot displays the 'Orders' module interface. At the top, the order number is 60016 for Caithness Energy LLC, dated 07/04/23, with a status of PENDING. The 'Bill To' section shows the customer's address: Caithness Energy LLC, Jim S Bishop, 565 Khrystall Ave # 29, New York, NY 10017. The 'Ship To' section also shows the same address, with a 'Blind' flag circled in red. The 'Order Items' section is currently empty. The bottom summary shows a Subtotal of 0.00, Total of 0.00, Shipping of 0.00, Tax of 0.00, and a Grand Total of 0.00. The interface includes various tabs like Sales, Billing, Fulfillment, and Shipping, and a bottom bar with search and tracking options.

3. In the Order Items section, search for and add one of the LICs that you created in the [Purchase Orders training guide](#) (<https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders>).
4. Make sure the **Qty** and **Unit Price** have info, then mark the flag for **DS**.
This tells aACE the item needs to be drop shipped.

Order: 60016 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To
 Caithness Energy LLC
 Jim S Bishop
 565 Khrystall Ave # 29
 New York, NY 10017

Ship To **End Customer**
 Caithness Energy LLC
 Jim S Bishop
 565 Khrystall Ave # 29
 New York, NY 10017

Comments & Next Steps

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > BW-12p	Blue Widget - 12 pin	0	0	0	+		1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32.10	0.00	32.10	100%

Subtotal 0.00 **Adjustment** 0.00 **Total** 0.00 **Shipping** 0.00 **Tax** 0.00 **Grand Total** 0.00

Sales **Billing** **Fulfillment** **Shipping**

Order Type: Sales Payment Account: Recurring Transaction: Currency: USD Exchange Rate: 1

Dept: AI Asgn By: DJ Asgn To: DJ Tracking Status:

Cancel **Save**

5. Click **Save** and **Open**.

6. Click the **Management** tab.

The Overview tab shows the Procured column with a value. This reflects the DS item that needs to be procured.

[illegible]

7. Click the **Procurement** tab.

This shows the PO to the LIC's vendor that aACE generated when you opened the sales order. aACE auto-fills *your customer's* address in the Ship To address of that PO.

Record: 1 of 1
New + Edit ✎ Delete ✕ Print 🖨 Actions ⚙

Order: 60016 | Caithness Energy LLC

[Sales Order](#)
[Management](#)
[Job Costs & Approvals](#)

07/04/23

OPEN ●

[Overview](#)
[Procurement](#)
[Production](#)
[Shipping & Receiving](#)
[Invoicing](#)
[Tasks & Preferences](#)

Order Item	Job	DS	SO	To Procure	Procured	Remain	%	Vendor	Vendors	Lead	Procure By	POs
> BW-12p Blue Widget - 12 pin connection		<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	1	100%		<input type="text"/>		07/06/23	<input type="checkbox"/> 1

Purchase Orders

PO	Date	Title	Vendor	PO Total	Balance	Req By	Tracking Status	Status
> 60000	07/04/23			0.00	0.00			

Dept AI
 Assign By DJ
 Assign To DJ
 Tracking Status

Note: aACE will *not* auto-generate a shipment for this order. The shipment will be prepared by the vendor, addressed to your customer.

8. Click the **Go-To** arrow (>) for the auto-generated PO.

This displays the Purchase Orders module, showing the detail view of this PO and the Ship To address for your customer company.

Purchase Order: 60000 | Electric Utility Co 07/04/23 **PENDING**

Vendor: Electric Utility Co, Jackie Wolinsky, 7050 N 16th St, New York, NY 10009

Ship To: Calithness Energy LLC, Jim S Bishop, 565 Khrystall Ave # 29, New York, NY 10017

PO Items:

Code	Description	Order	Job	Dept	Cases	Quantity	Unit Cost	Total
1 > BW-12p	Blue Widget - 12 pin connection	60016		AI-A/P		1	0.00	0.00

Subtotal: 0.00
Shipping: 0.00
Tax: 0% 0.00
Total: 0.00
Payment Due: 0.00
☐ Use Tax 0.00

9. In the PO module header bar, click **Actions > Open**.

10. When you see the confirmation dialog, click **Open**.

This workflow would continue with processing the purchase, as covered in the [Purchase Orders training guide](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) (<https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders>). To further enhance drop shipping, you can add [more details to an LIC record](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#LICoverview_Vendors) (https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#LICoverview_Vendors). For example, you can set vendor-specific part numbers, codes, or product descriptions that aACE will include on PO records to *that* vendor.

Special Orders

[Special order \(SO\) items](https://aace6.knowledgeowl.com/help/working-with-special-orders) (<https://aace6.knowledgeowl.com/help/working-with-special-orders>) are typically used for handling product that you do *not* keep in stock. For example, a customer might order an assembled item which requires parts you don't regularly stock. A PO is generated from the order for that special order part. The part is shipped to you to be inspected or assembled before you ship the final product to the customer.

To demonstrate this functionality, we'll again run through the process for creating a sales order, focusing on the steps for flagging items as special ordered. Then we'll process the PO so the sales order progress can continue.

1. In the Orders module, click **New > Sales**.
2. From the Bill To company selection popup, enter your customer company.
3. In the Order Items section, search for and add the LIC you created in the [Purchase Orders training guide](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) (<https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders>).
4. On that line, make sure the **Qty** and **Unit Price** have info, then mark the flag for **SO**. This tells aACE the item needs to be special ordered.

Order: 60019 **Caithness Energy LLC** **07/04/23** **PENDING**

Bill To
Caithness Energy LLC
Jim S Bishop
565 Khrystall Ave # 29
New York, NY 10017

Ship To
Caithness Energy LLC
Jim S Bishop
565 Khrystall Ave # 29
New York, NY 10017

Order Items

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantit	SO	DS	SO	Unit Price	Unit Adj	Total	Margin
1	Blue Widget - 12 pin	0	0	0				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	32.10	0.00	32.10	100%

Subtotal 0.00 **0%**
Adjustment 0.00
Total 0.00 **0%**
Shipping 0.00 **0%**
Tax NYC 0.00
Grand Total 0.00 **0%**

Order Type Sales **Payment Account** **Recurring Transaction** **Currency** USD **Exchange Rate** 1

Dept AI **Asgn By** DJ **Asgn To** DJ **Tracking Status**

Cancel **Save**

5. Click **Save** and **Open**.
6. Click the **Management** tab.
In the Overview tab, note that the Procured column has a value. This reflects the SO item.

[illegible]

7. Click the **Procurement** tab.

This shows the PO to the LIC's vendor that aACE generated when you opened the sales order. aACE auto-fills *your company* address in the Ship To address of that PO.

[illegible]

8. Click the **Go-To** arrow (>) for the auto-generated PO.

This displays the Purchase Orders module, showing the detail view of this PO. Note that the Ship To address is *your* company.

Purchase Order: 60001 | Electric Utility Co 07/04/23 **PENDING**

Vendor: Electric Utility Co, Jackie Wolinsky, 7050 N 16th St, New York, NY 10009


Ship To: aACME Education Solutions, Inc., Mark Jennings, 1238 Broadway, New York, NY 10001

PO Items:

Code	Description	Order	Job	Dept	Cases	Quantity	Unit Cost	Total
1 > BW-12p	Blue Widget - 12 pin connection	60019		AI-A/P		1	0.00	0.00

Summary: Subtotal: 0.00, Shipping: 0.00, Tax: 0%, Total: 0.00, Payment Due: 0.00

Purchasing/Receiving Details: Purchase Order Type: Order Fulfillment, Priority: , Payment Date: 08/03/23, Recurring Transaction: , Currency: USD, Exchange Rate: 1

9. In the PO module header bar, click **Actions** > **Open**.
10. When you see the confirmation dialog, click **Open**.
11. In the PO record detail view, click **Management** > **Shipping & Receiving**.
aACE does *not* auto-generate an incoming shipment record for the special order item. You or a member of your warehouse team must receive the incoming shipment manually. Below we will review a slightly different workflow than what you learned in [Discovery Training: Purchase Orders](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) to receive this shipment.
12. Click the line-level **Actions** () for the PO item, then click **Receive Item**.


Purchase Orders

Record: 1 of 1

Purchase Order: 60001 | Electric Utility Co **07/04/23** **OPEN**

Purchase Order Details Management

Overview Purchasing **Shipping & Receiving**

Purchase Order Item	To Receive	Received	Remain %	Expected Date	Shipments
> BW-12p Blue Widget - 12 pin connection	1	0	1 100%	TBD	

Shipments

Shipment	Delivery Date	Title	Rec Type	Order	Carrier Service	Carrier Tracking #	Cost	Tracking Status	Status

This displays the Shipping Log module, showing the incoming shipment for your SO item in Edit mode. The shipment is automatically linked to the initial sales order and to the PO.


Shipping Log

Record: 1 of 1

Shipment: 60005 | Electric Utility Co **07/04/23** **PENDING**

Incoming Shipment

Ship From

Ship From >  **Electric Utility Co**
 Jackie Wolinsky
 7050 N 16th St
 New York, NY 10009

Shipment Type

Incoming

Ship Terms Ship Point

Declared Value 0.00

Shipment Info

Carrier **USPS** Carrier Service **First-Class Mail** Account #

Carrier Tracking (PRO) # Packing List # Delivery Date **07/04/23**


Weight L W H Shipping Cost 0.00

Description

Package Type Package IDs

Packing List

Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Bin	Ref #(s)
1 > BW-12p	Blue Widget - 12 pin connection	> 60019	> 60001	1 >	1	0	C-AI	#s

1 0 

Dept: AI-Shipping Assign To: KH Tracking Status

Cancel Save

- Click **Save**, then click **Yes**.
aACE marks the shipment as Received.

14. Close the Shipping Log module and the Purchase Orders module.

15. In the initial sales order, click the **Shipping & Receiving** tab.

This shows the Shipments section with the two relevant shipment records.

Order Item	BO	Notify	DS	SO	To Ship	Ready To Ship	Shipped	Remain	%	Ship Date	Shipping Cost	Shipments
> BW-12p Blue Widget - 12 pin connection				<input checked="" type="checkbox"/>	1	1	0	1	100%	07/06/23	0.00	1

Shipment	Delivery Date	Title	Rec Type	PO	Carrier Service	Carrier Tracking #	Cost	Tracking Status	Status
> 60005	07/04/23	Electric Utility Co	IN	> 60001	First-Class Mail		0.00		
> 60006		Caithness Energy LLC	OUT				0.00	Ready to Pick	

Note: In the Shipments portal, the Rec Type column labels the first shipment as 'IN' and the second shipment as 'OUT'. The 'IN' shipment represents receiving the SO item from the vendor. The 'OUT' shipment represents sending the SO item to the customer. Once you mark the incoming shipment as Received, aACE auto-generates the outgoing shipment.

16. To finish this workflow, navigate to the outgoing shipment and mark it as Shipped.

This prompts aACE to auto-generate the invoice. Once that invoice is in Open status, the original order will be marked Closed. (We will discuss more details about invoicing in a subsequent guide.)

Ship Types

aACE supports multiple Ship Types that you can specify on an order. These settings specify how the customer will receive their order items:

The screenshot shows the aACE Orders interface for Order 50697, Regina County Area School District, dated 06/21/23. The order status is OPEN. The interface includes sections for Bill To, Ship To, Description, Additional Info, Order Items, and a summary table. A dropdown menu for Ship Type is open, showing options: Complete, Pick Up, Complete, Partials OK, and N/A. The 'Pick Up' option is highlighted. The Order Items table lists two items: MKTG-CAT (Catalog) and DRY-E (Dry Erase Markers). The summary table shows a Subtotal of 225.00, Total of 225.00, and Grand Total of 225.00.

Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SO	Unit Price	Unit Adj	Total	Margin
1 > MKTG-CAT	Catalog	0	0	+			1				0.00	0.00	0.00	0%
2 > DRY-E	Dry Erase Markers	325	0	0	+	0.625	25				9.00	0.00	225.00	11%

Item	Description	Amount	Margin
Subtotal		225.00	10%
Adjustment		0.00	
Total		225.00	10%
Shipping		0.00	
Tax	OUT	0.00	
Grand Total		225.00	10%

- Pick Up — The customer will come to your facility in person and receive their items.
- Complete — No order items will be shipped until *all* items are ready for shipment.
- Partials OK — Multiple shipments may be sent out as order items become available. This is typically relevant when you have some of the needed product in stock, but the rest is on backorder.
- N/A — No shipping is needed. This setting is used often for made-to-stock production orders. In a sense, your company is the customer for these orders. The order is needed to track the production effort, but the finished items will not be packaged and shipped to another organization.

Additional Tasks for Outgoing Shipments

In some situations, there may be other tasks needed before an outgoing shipment is ready. Typically, these are production tasks on a production order. aACE would wait for these tasks to be marked Complete, then generate the outgoing shipment. These workflows are discussed more in the subsequent guide for Discovery Training: Production.

Third-Party Shipping Solutions and aACE Apps

aACE includes a handful of mobile apps and integrations related to shipping your products. aACE's Pick App is an app for your warehouse team to pick and log product shipments.

Additionally, aACE can integrate seamlessly with other shipping software to help streamline your workflows. [aACE+ NRG](https://www.nrgsoft.com/) (<https://www.nrgsoft.com/>), [aACE+ ReadyShipper](https://www.readycloud.com/readyshipper-shipping-software) (<https://www.readycloud.com/readyshipper-shipping-software>), and [aACE+ ShipStation](https://www.shipstation.com/?ref=sp-1349844) (<https://www.shipstation.com/?ref=sp-1349844>) provide support for UPS, FedEx, USPS, and a variety of LTL carriers. You can read more about [choosing a shipping solution](https://aace6.knowledgeowl.com/help/choosing-a-shipping-solution) (<https://aace6.knowledgeowl.com/help/choosing-a-shipping-solution>) if you do not yet have one or are considering switching your shipping solution.

These topics are covered in further detail later in the process. For now, be sure to check our webinar about the [aACE+ ShipStation integration](https://showme.aacesoft.net/?id=10587) (<https://showme.aacesoft.net/?id=10587>).

Test Your Understanding

After working through the tasks in this training guide, use this online exam to see how well you understand these aACE features: [Sales Orders Discovery Training Quiz](https://elearning.easygenerator.com/9c104bb8-7dff-44df-a538-a4467d18aa26/) (<https://elearning.easygenerator.com/9c104bb8-7dff-44df-a538-a4467d18aa26/>)

Next Guide

[Discovery Training: Production](https://aace6.knowledgeowl.com/help/discovery-training-production) (<https://aace6.knowledgeowl.com/help/discovery-training-production>)
