

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.

After you practice working in aACE, use the short quiz at the end of this guide to solidify your understanding.

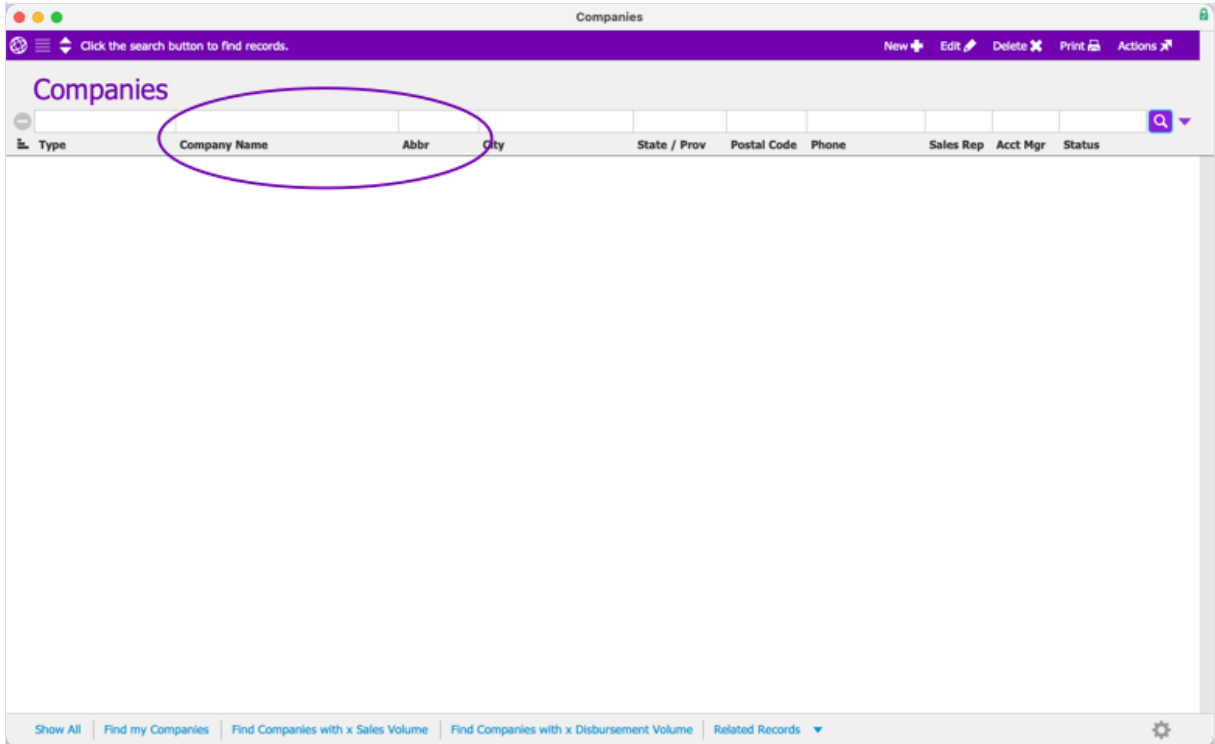
Creating Contacts from the Companies Module

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 (>).

Type	Company Name	Abbr	City	State / Prov	Postal Code	Phone	Sales Rep	Acct Mgr	Status
> Customer	622 3rd Avenue Co LLC	50190	New York	NY	10017	(555) 465-9685	MH		ACTIVE
> Customer	ACC Construction Corp	50191	New York	NY	10018	(555) 666-9331	MH		ACTIVE
> Customer	AECOM Tishman	50192	New York	NY	10013	(646) 435-6377	MH		ACTIVE
> Customer	AFG Construction Mgmt Inc	50193	New York	NY	10123	(555) 450-2674	MH		ACTIVE
> Customer	American Construction Inc	50194	New York	NY	10271	(555) 264-0199	MH		ACTIVE
> Customer	Asphalt Green	50195	New York	NY	10128	(555) 264-8890	MH		ACTIVE
> Customer	Caithness Energy LLC	50196	New York	NY	10017	(555) 911-9099	MH		ACTIVE
> Customer	Chestnut Ridge Middle School	50160	Chestnut Ridge	NY			MH		ACTIVE
> Customer	Clark Construction Corp	50197	New York	NY	10003	(555) 309-1783	MH		ACTIVE
> Customer	Creative Finishes LTD	50198	New York	NY	10001	(555) 222-6920	MH		ACTIVE
> Customer	D J Knight & Co LTD	50199	New York	NY	10003	5555555555	MH		ACTIVE
> Customer	New York Learning Co	NYLC	Brooklyn	NY	11238		JG	MH	ACTIVE
> Customer	P.S. 118	50127	Bronx	NY	10457	(555) 212-8475	JG	MH	ACTIVE
> Customer	Penn Harris Madison	50091	Tarrytown	NY	10591		JG	MH	ACTIVE
> Customer	Queens County School District	50088	Astoria	NY	11105	(212) 555-0874	JG	MH	ACTIVE
> Customer	Westbury Catholic High School	50136	Westbury	NY	11590	(518) 555-7484	JG	MH	ACTIVE

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

Company: Caithness Energy LLC (50196) ACTIVE

Company Details | Sales & Marketing | Customer Details | Vendor Details | Finance & Accounting

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: [] | Alt Phone: []

Fax: [] | Phone / Fax Format: []

Email: []

Web Address: []

Email Format (using "John Q Public"): []

Other Info

Group: Construction | Subgroup: Utilities

Parent Company: []

Referral Company: []

Referral Contact: []

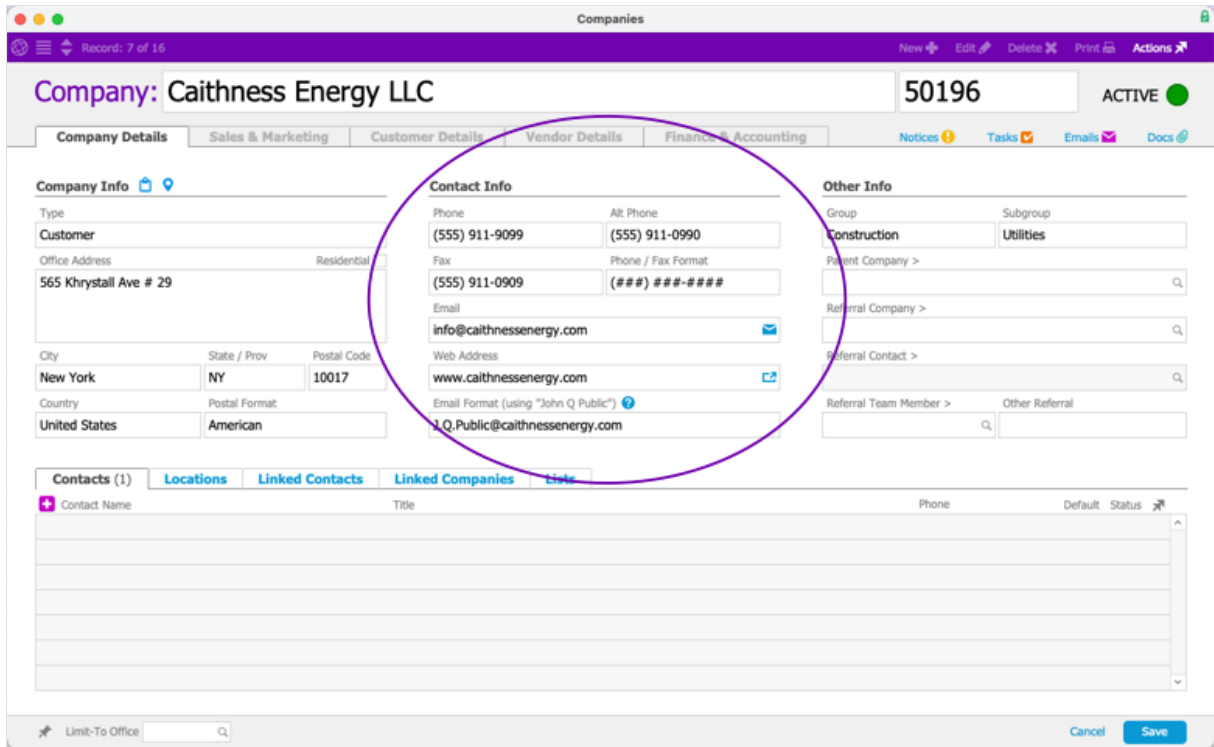
Referral Team Member: [] | Other Referral: []

Contacts (1) | Locations | Linked Contacts | Linked Companies | Lists

Contact Name	Title	Phone	Default	Status

Limit-To Office: []

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**.

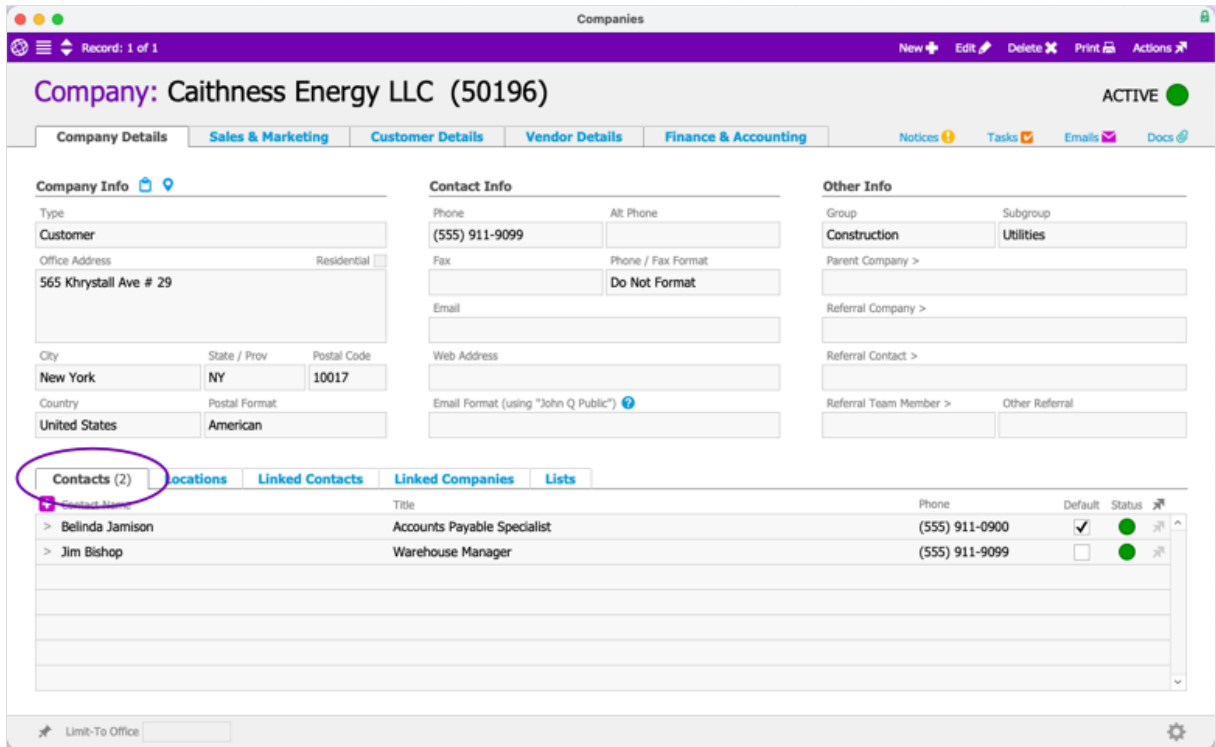


Note: The Phone / Fax Format and Email Format fields allow you to configure aACE so the system can help you enter data more consistently. You can specify the [default formatting for postal and phone number fields](https://aace6.knowledgeowl.com/help/changing-the-default-postal-and-phone-formats) (<https://aace6.knowledgeowl.com/help/changing-the-default-postal-a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



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.

The screenshot shows the 'Contacts' interface for a contact named 'Salut'. The status is 'PENDING'. The form is divided into several sections:

- Company Info:** Includes fields for Photo, Title, Department, Company (Caithness Energy LLC), Address (565 Khrystall Ave # 29), City (New York), State/Prov (NY), Postal Code (10017), Country (United States), and Postal Format (American).
- Contact Info:** Includes fields for Direct Phone, Office Phone (555) 911-9099, Ext., Mobile Phone, Home / Other, Fax (555) 911-0909, Phone / Fax Format, Primary, Email, Alt Email, and Web Address (www.caithnessenergy.com).
- Best Way to Reach:** A large empty text area.
- Alt Contact Types:** A table with columns for Type and Value.
- Related Contacts (1):** A table with columns for Contact Name, Title, Department, and Location.

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).

The screenshot shows the 'Contacts' interface for a contact named 'Jim'. The status is 'ACTIVE'. The form fields are now populated with data:

- Company Info:** Title is 'Warehouse Manager', Department is 'Distribution Facilities', Company is 'Caithness Energy LLC', Address is '565 Khrystall Ave # 29', City is 'New York', State/Prov is 'NY', Postal Code is '10017', Country is 'United States', and Postal Format is 'American'.
- Contact Info:** Direct Phone is empty, Office Phone is (555) 911-9099, Ext. is empty, Mobile Phone is empty, Home / Other is empty, Fax is (555) 911-0909, Phone / Fax Format is (###) ###-####, Primary is empty, Email is j.s.bishop@caithnessenergy.com, Alt Email is empty, and Web Address is www.caithnessenergy.com.
- Best Way to Reach:** A large empty text area.
- Alt Contact Types:** A table with columns for Type and Value.
- Related Contacts (1):** A table with columns for Contact Name, Title, Department, and Location.

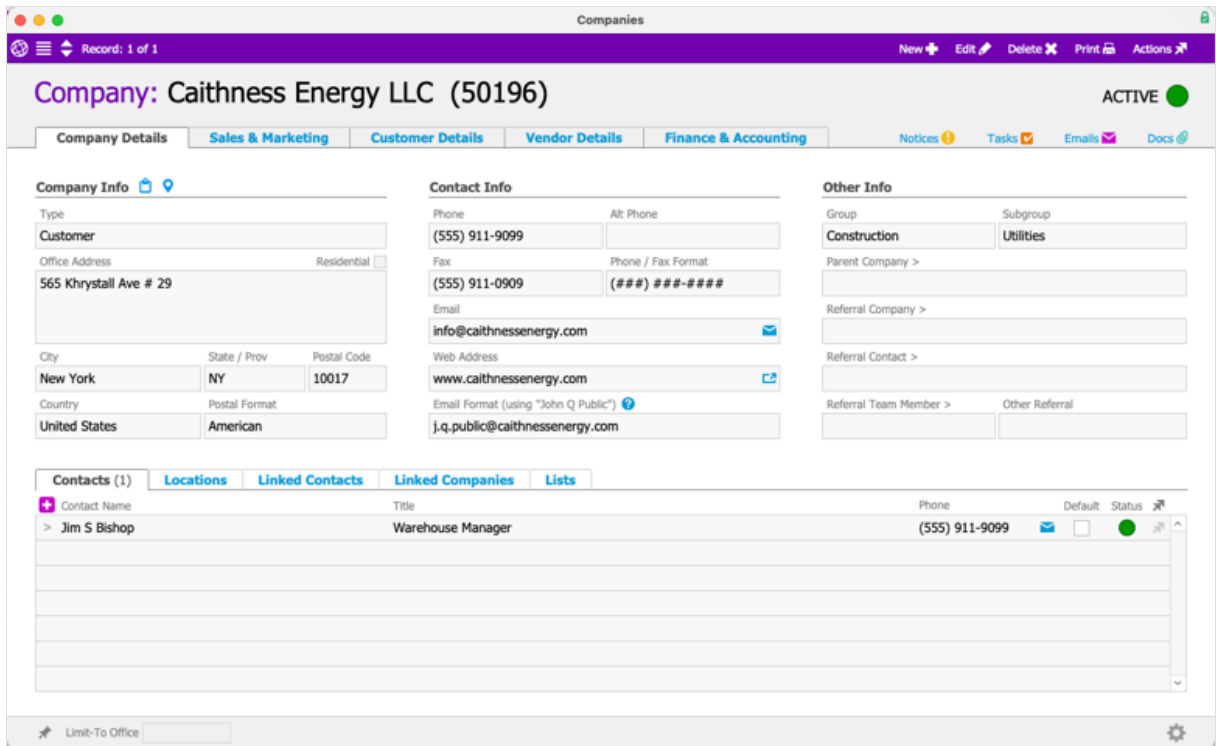
3. Click **Save**.

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

4. Click **Activate**.

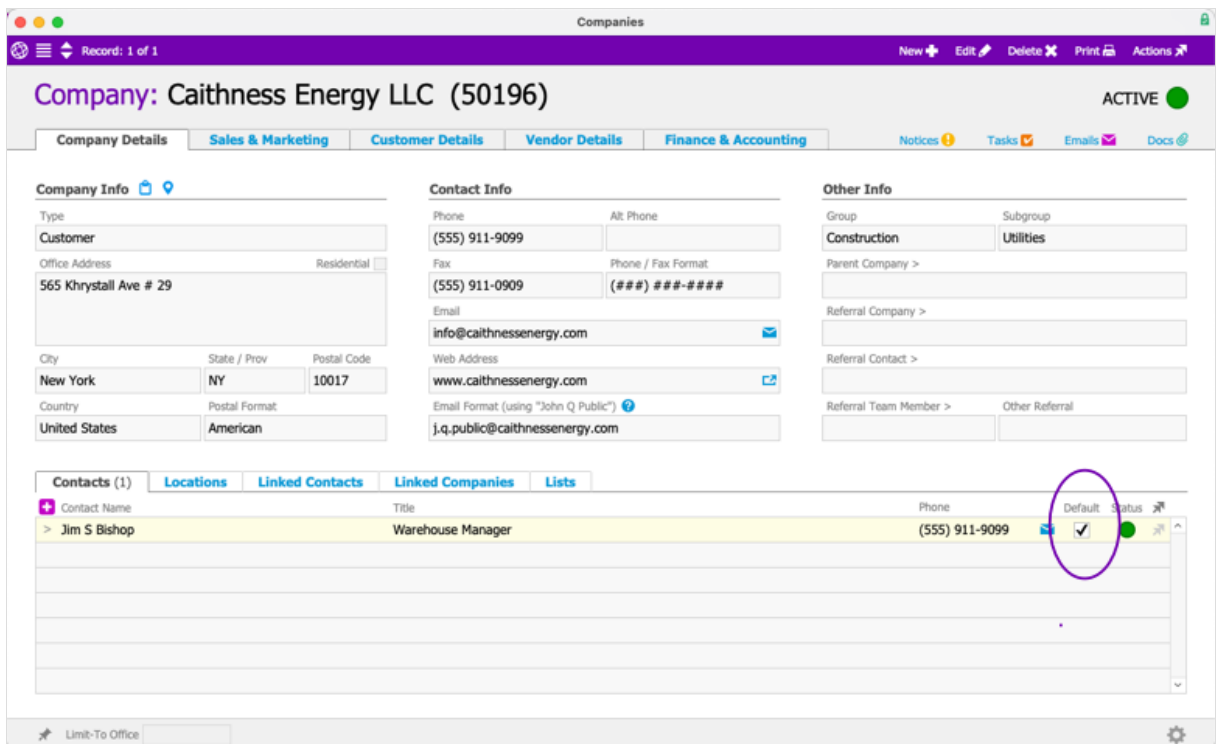
aACE updates the record status to Active.

- 5. Close the Contacts module and return to the Companies module.
aACE lists the new contact on the Contacts tab.

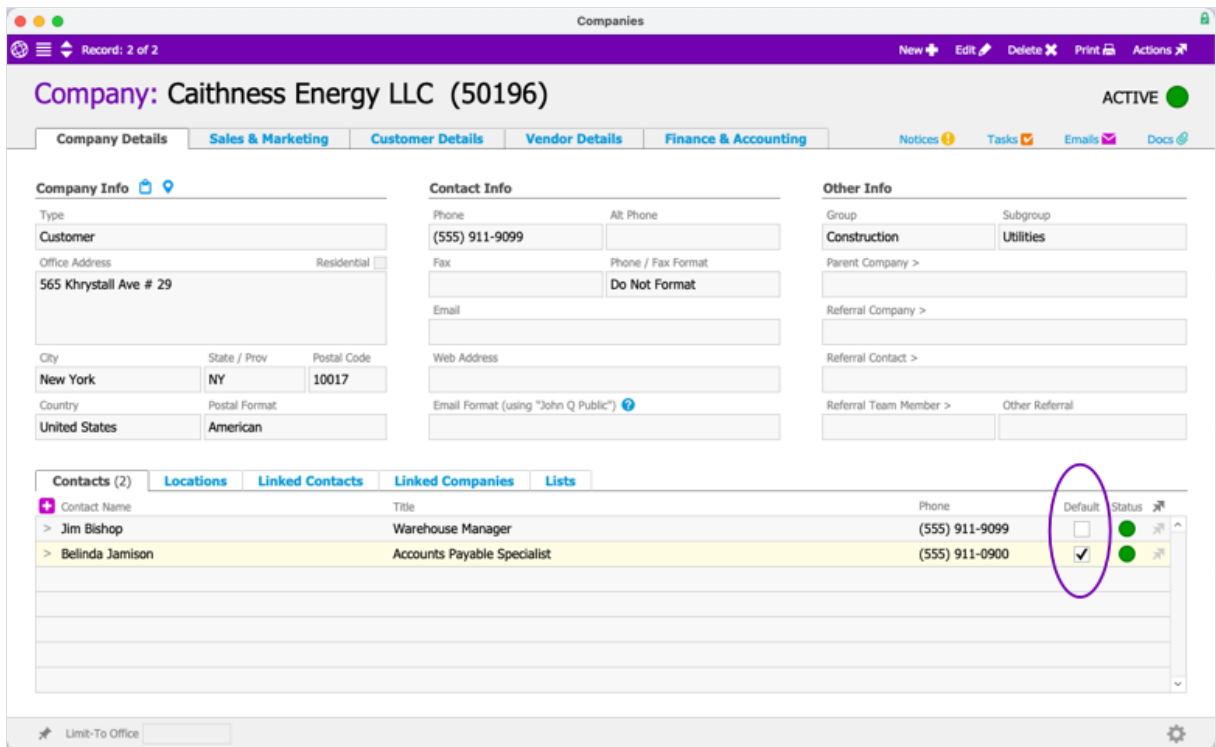


- 6. Mark the flag to identify your new contact as the **Default**.

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.



- 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.



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

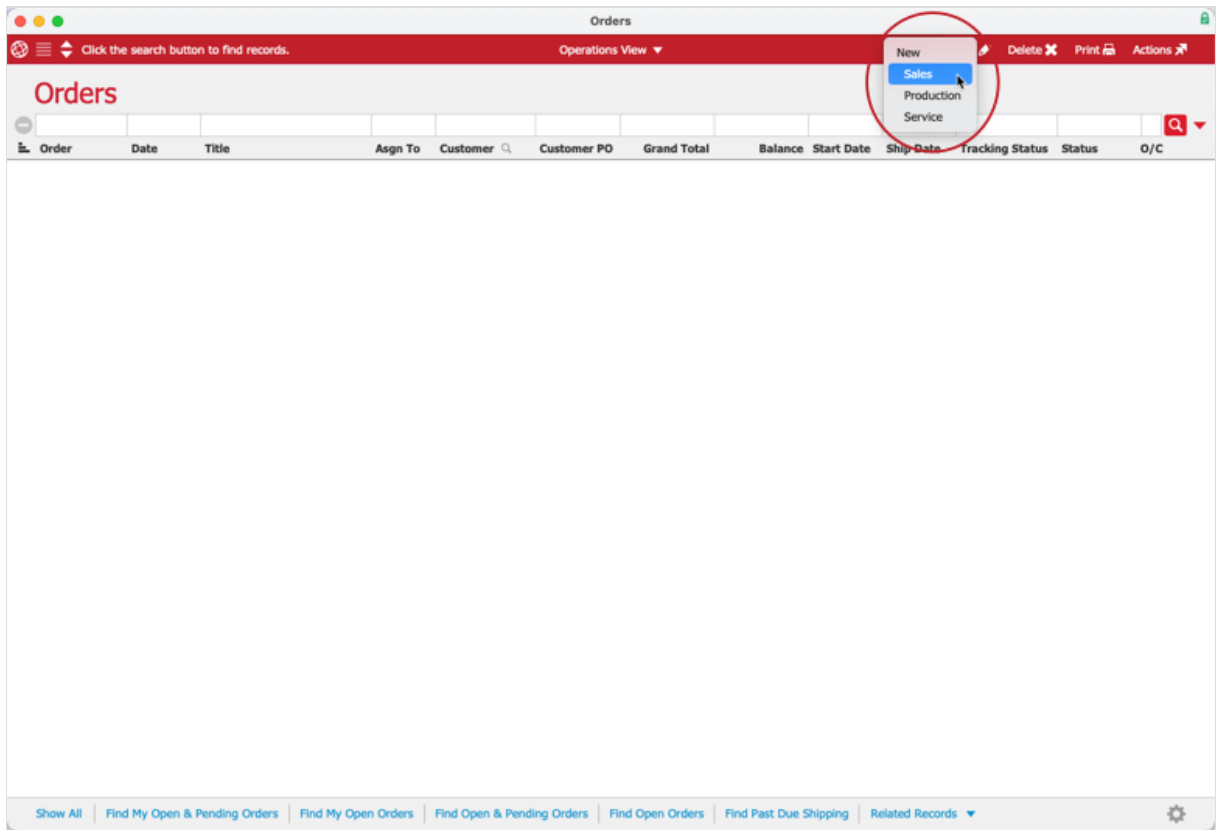
The Orders module allows you to view, manage, and fulfill orders. It is one of the most important screens in your aACE system. aACE includes functionality for multiple types of orders (i.e. sales, production, and service). These three types prioritize certain features that are most helpful for certain 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.

- 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.



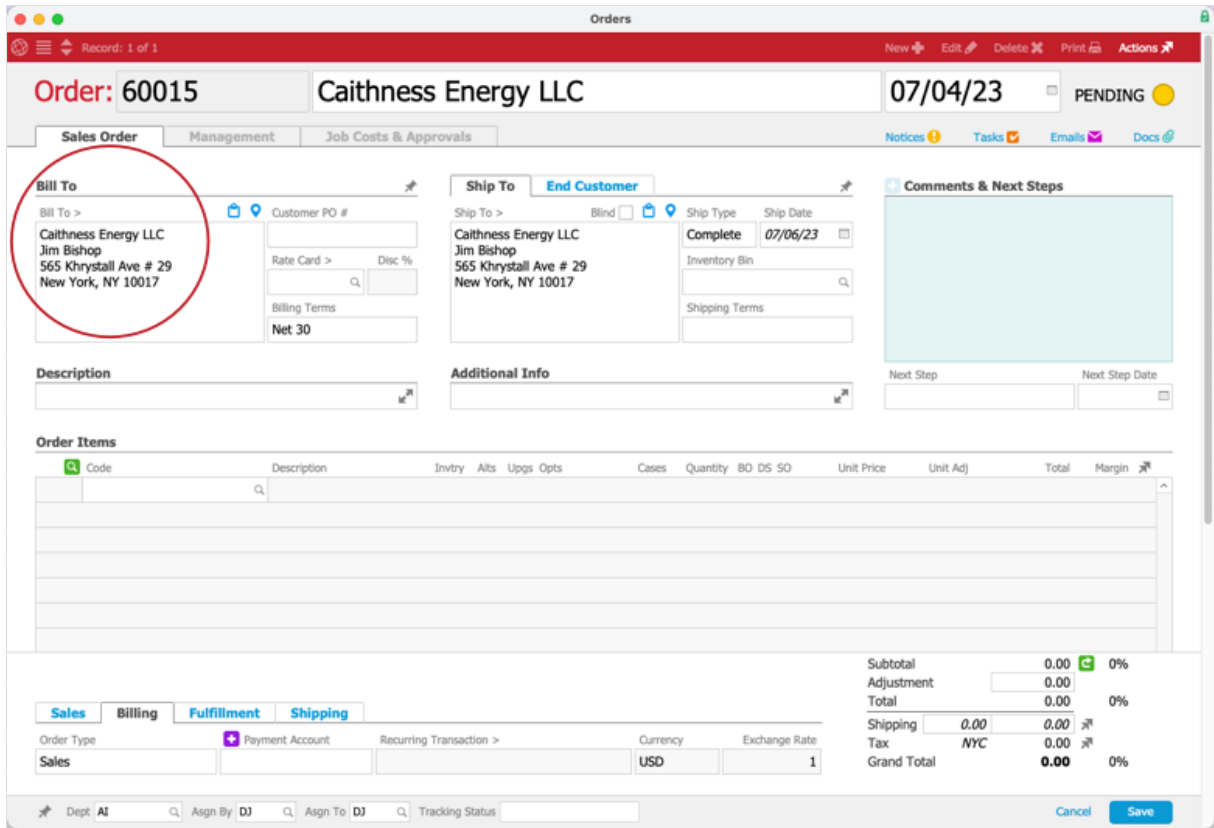
2. Click **Sales**.

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 interface. At the top, the order number '60015' and date '07/04/23' are visible, along with a 'PENDING' status. The main form is divided into sections for 'Bill To' and 'Ship To'. A 'Bill To' company selection popup is open, showing a search bar and various address and contact fields. The main form also includes a 'Comments & Next Steps' section and a summary table at the bottom right.

Item	Value	Margin
Subtotal	0.00	0%
Adjustment	0.00	
Total	0.00	0%
Shipping	0.00	0%
Tax (Required)	0.00	0%
Grand Total	0.00	0%

- 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.



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 **Ship To** **Comments & Next Steps**

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

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

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

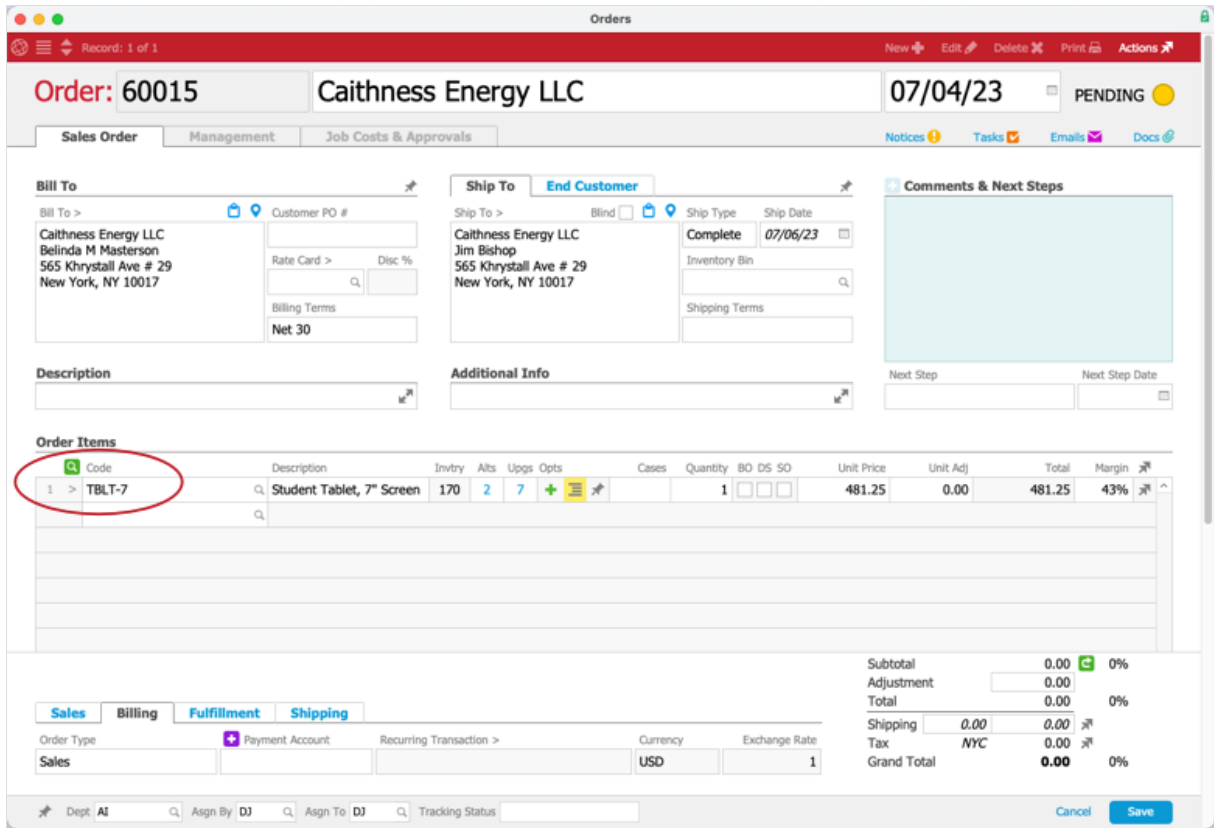
Order Type: Sales Payment Account: Recurring Transaction: Currency: USD Exchange Rate: 1

Dept: AI Assign By: DJ Assign To: DJ Tracking Status: **Cancel** **Save**

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.



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.

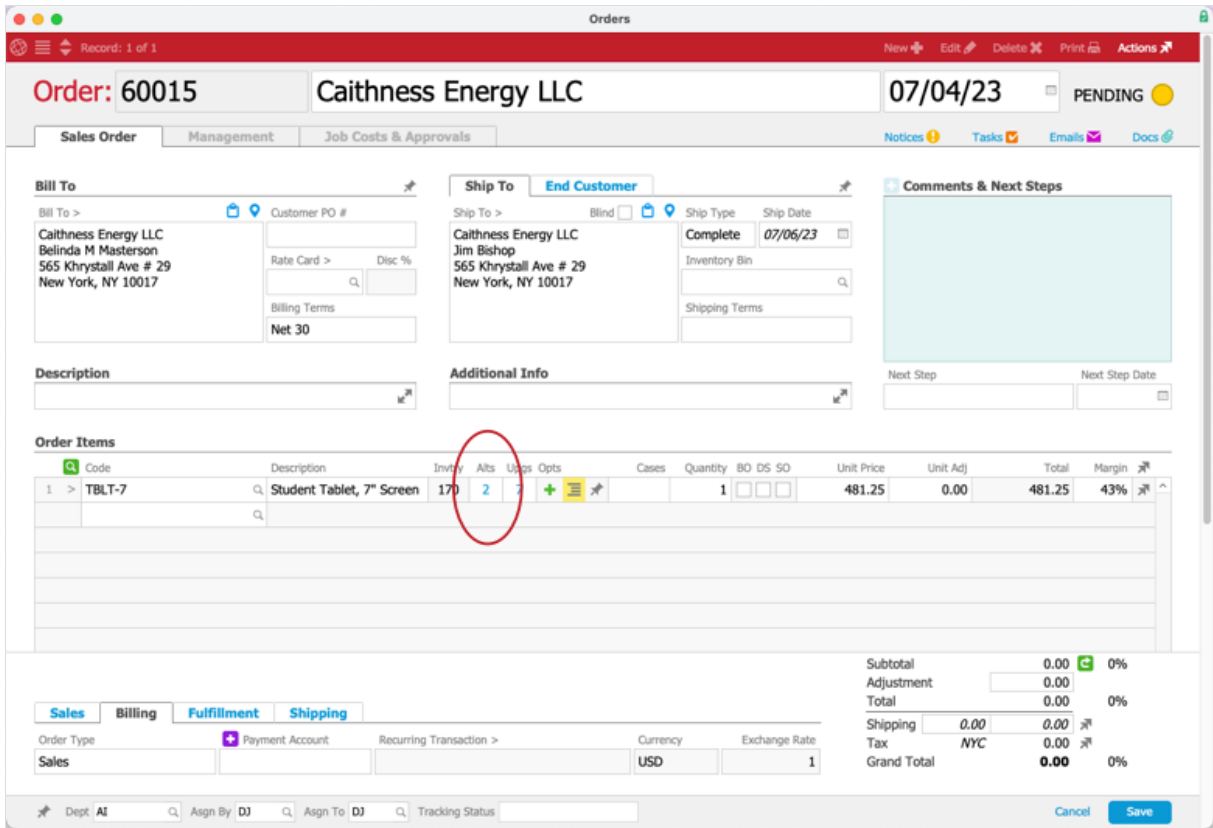
Order: 60015 **Caithness Energy LLC** **07/04/23** **PENDING**

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.

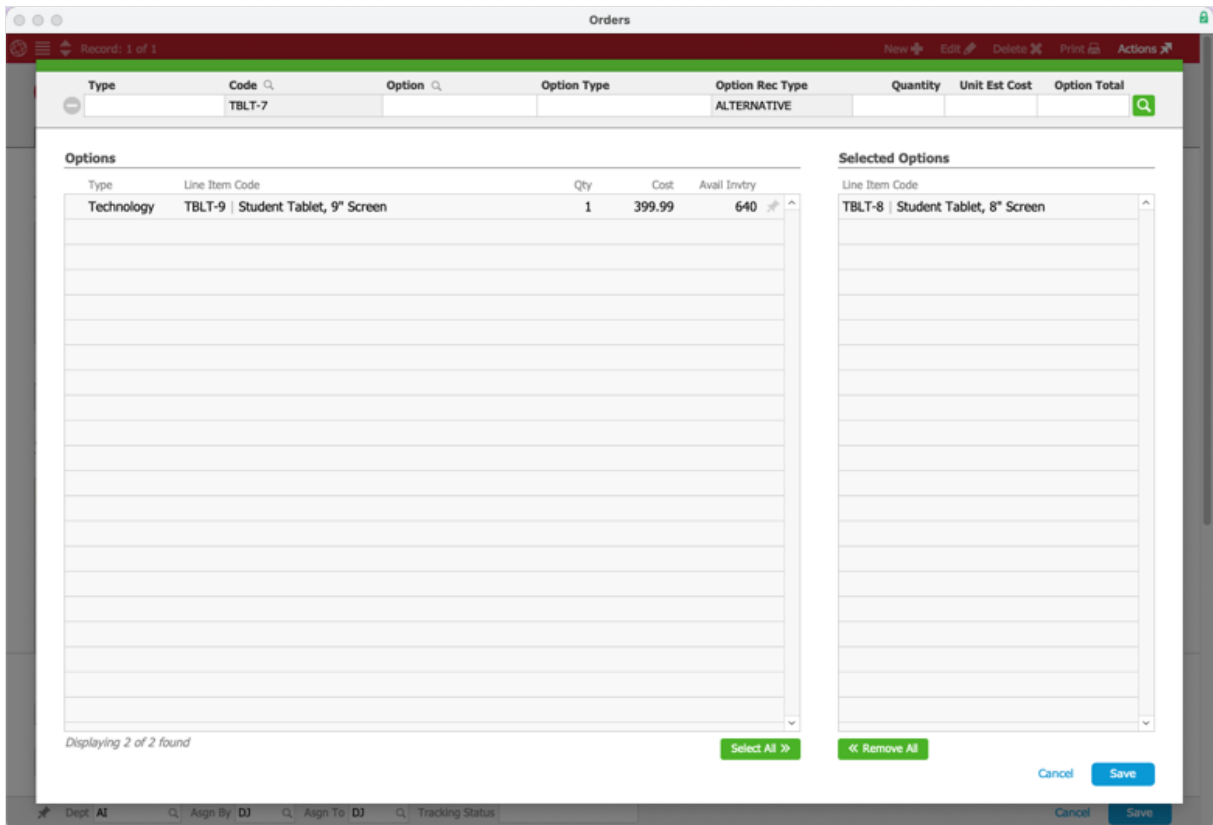
Code	Description	Invtry	Alts	Upps	Opts	Cases	Quantity	BO	DS	SP	Unit Price	Unit Adj	Total	Margin
1	TBLT-7 Student Tablet, 7" Screen	170	2	7	+		1				481.25	0.00	481.25	43%

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%).

- 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.

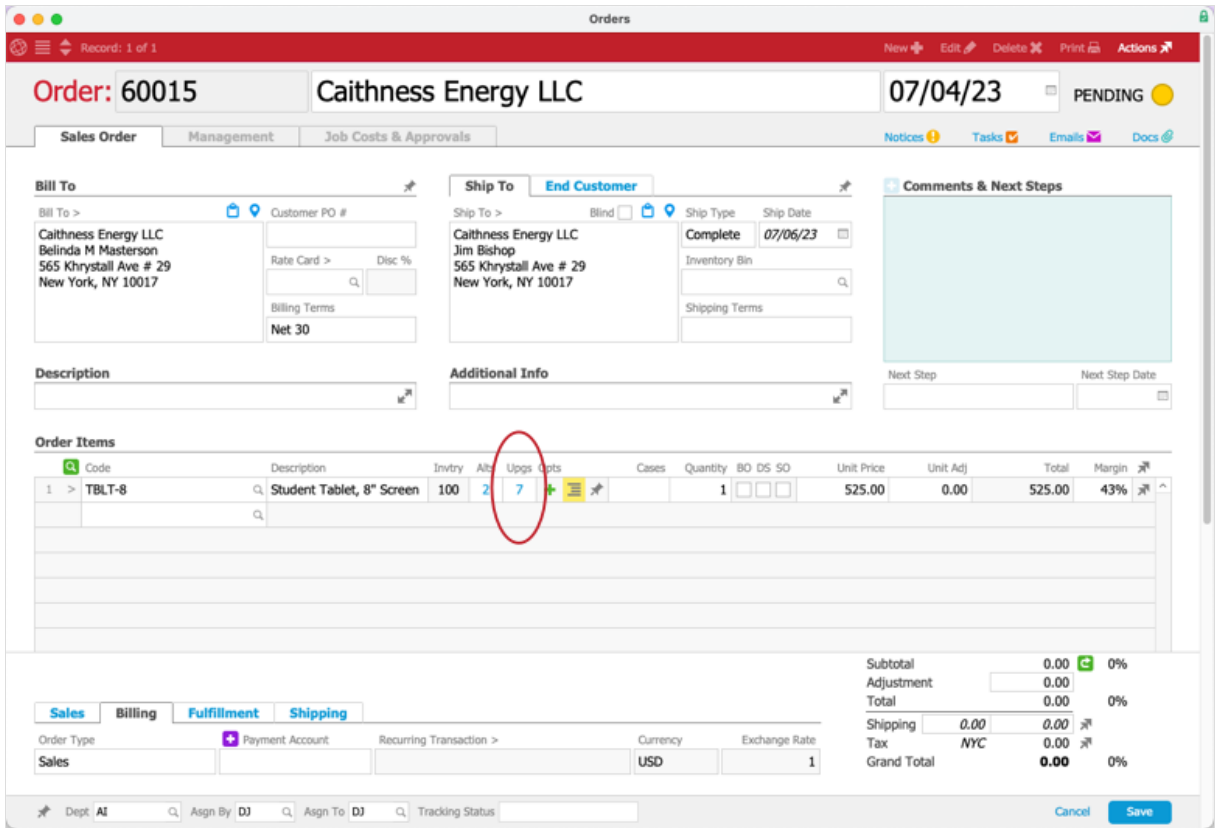


- In the Options Selector, select **TBLT-8** and click **Save**.
aACE removes the TBLT-7 LIC and enters the TBLT-8 LIC, updating the pricing.



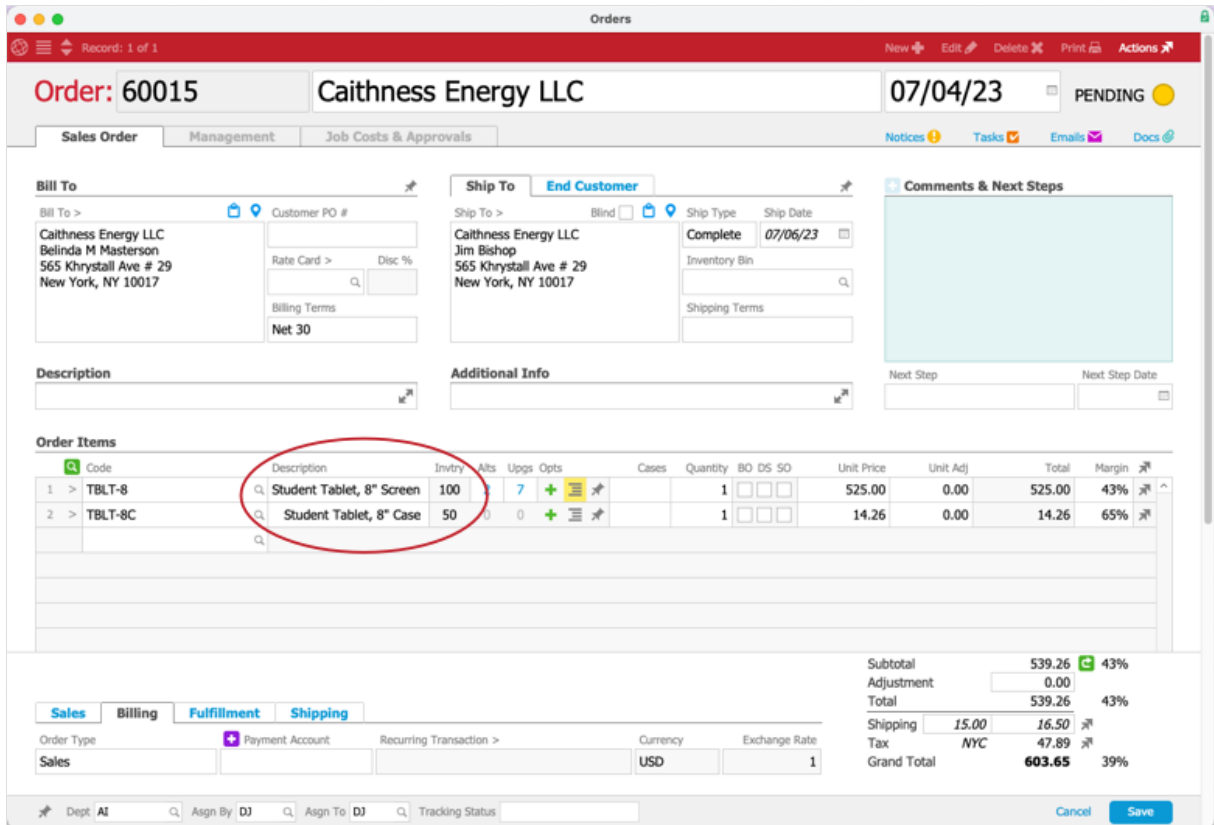
- In the Order Items section again, click the blue highlighted number in the **Upgs** column.

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.



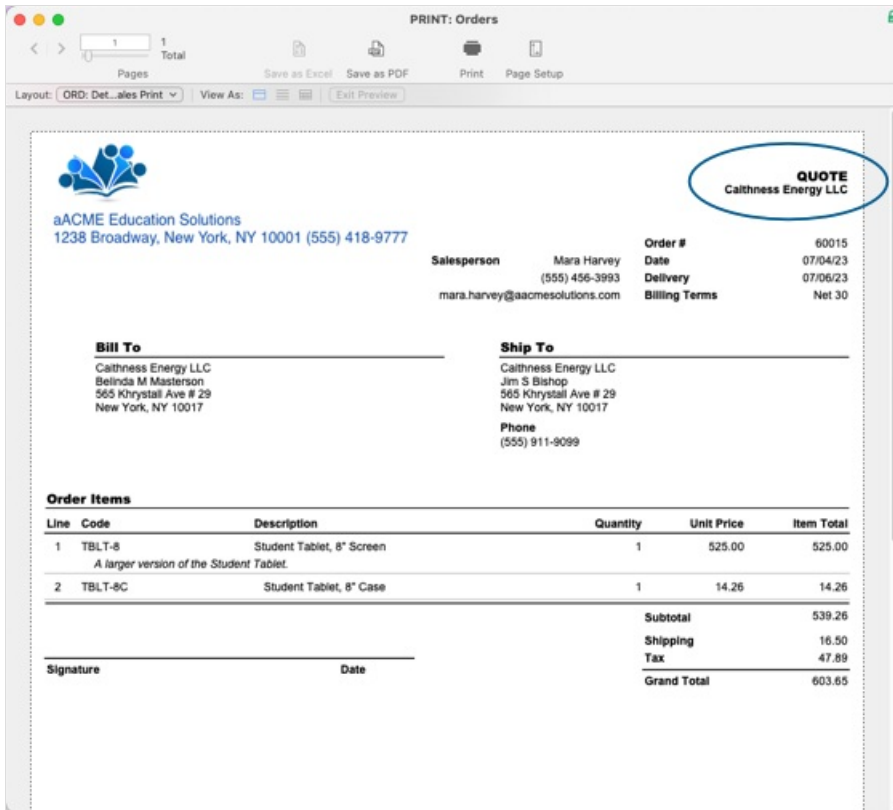
11. In the Options Selector, select **TBLT-8C** and click **Save**.

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.

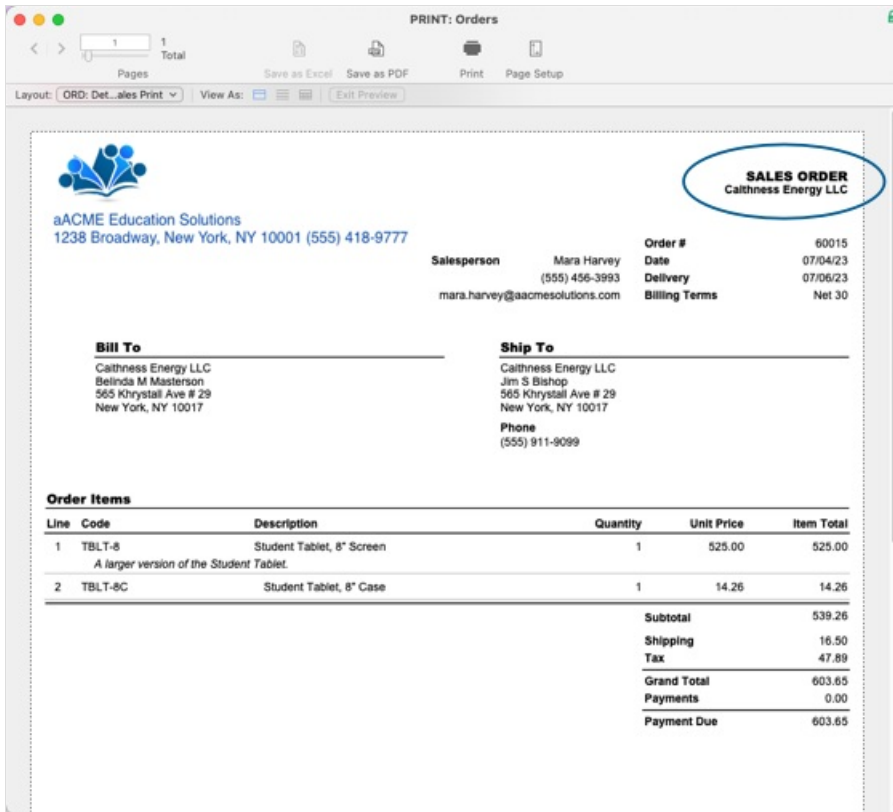


Note: You can also have aACE automatically [add upgrade items by configuring the LIC record](https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options) (<https://aace6.knowledgeowl.com/help/working-with-alt-upsgrades-and-options>).

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.



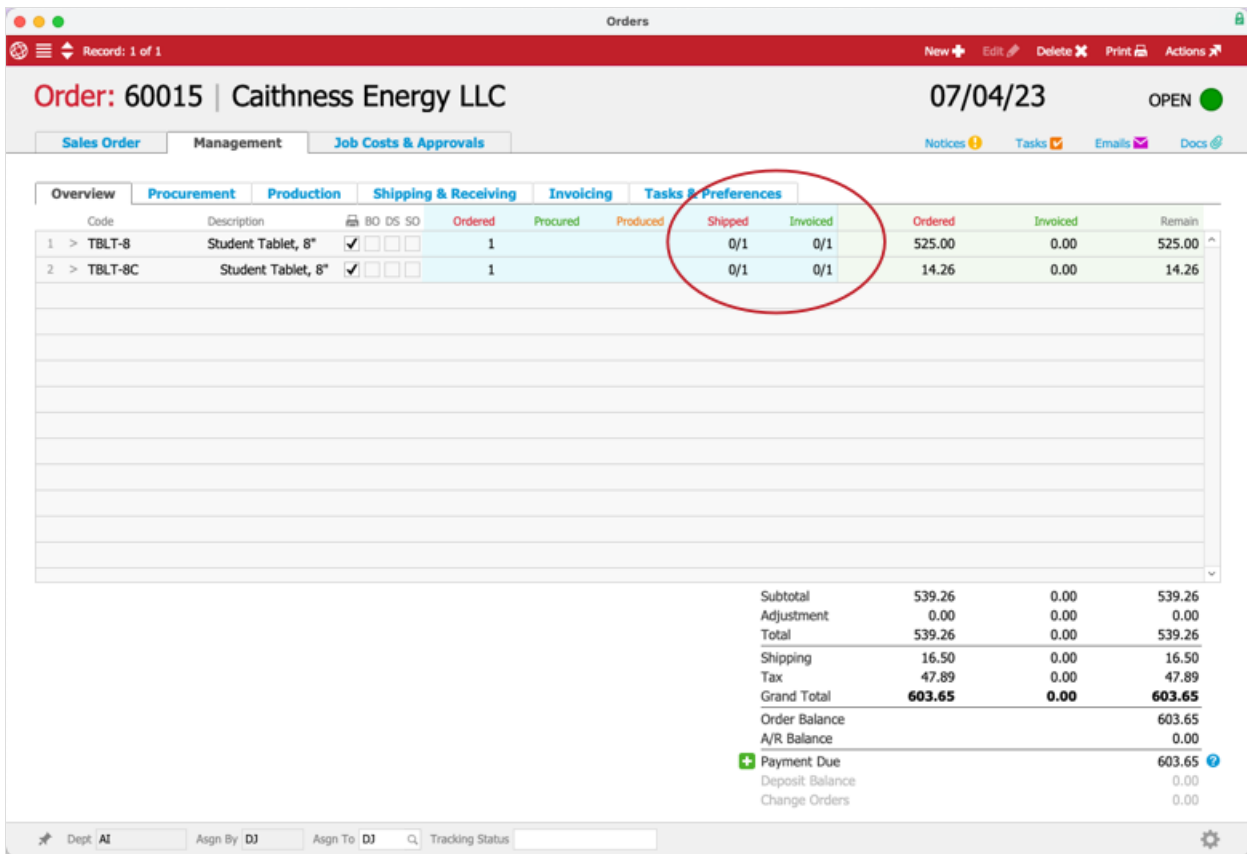
15. Close the print preview.
16. In the order record header bar, click **Actions**, then **Open**.
aACE runs validations and prompts you to open the order.
17. Click **Open** again.
aACE moves the order to Open status.
18. In the header bar again, click **Print**, then **Print this View** again.
This 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.



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). For example, clicking the Management tab initially displays the Overview tab.



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.

The screenshot shows the 'Shipping Log' application interface. At the top, there's a red header bar with 'Record: 5 of 5' and action buttons: 'New', 'Edit', 'Delete', 'Print', and 'Actions'. Below the header, the title 'Shipments' is displayed. A search bar is present on the right. The main area contains a table with the following columns: Shipment, Date, Title, Asgn To, Company, Carrier Service, Tracking #, Cost, Tracking Status, and Status. Five rows of shipment data are visible, with the last row (60015) highlighted in yellow. Below the table, there's a 'List Totals' section showing a cost of 0.00. At the bottom, there are filter options: 'Show All', 'Find My Pending Shipments', 'Find Pending Shipments', 'Constrain to Outgoing', 'Constrain to Incoming', 'More Finds', and 'Related Records'.

Shipment	Date	Title	Asgn To	Company	Carrier Service	Tracking #	Cost	Tracking Status	Status
> 60002		Caithness Energy LLC	KH	Caithness Energy LLC			0.00	Ready to Pick	PENDING
> 60006		Caithness Energy LLC	KH	Caithness Energy LLC			0.00	Ready to Pick	PENDING
> 60008		Justina Ford Elementary School	KH	Justina Ford			0.00	Ready to Pick	PENDING
> 60013		Centerville High School	KH	Centerville High			0.00	Ready to Pick	PENDING
> 60015		Chadwick High School	KH	Chadwick High			0.00	Ready to Pick	PENDING

- 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.

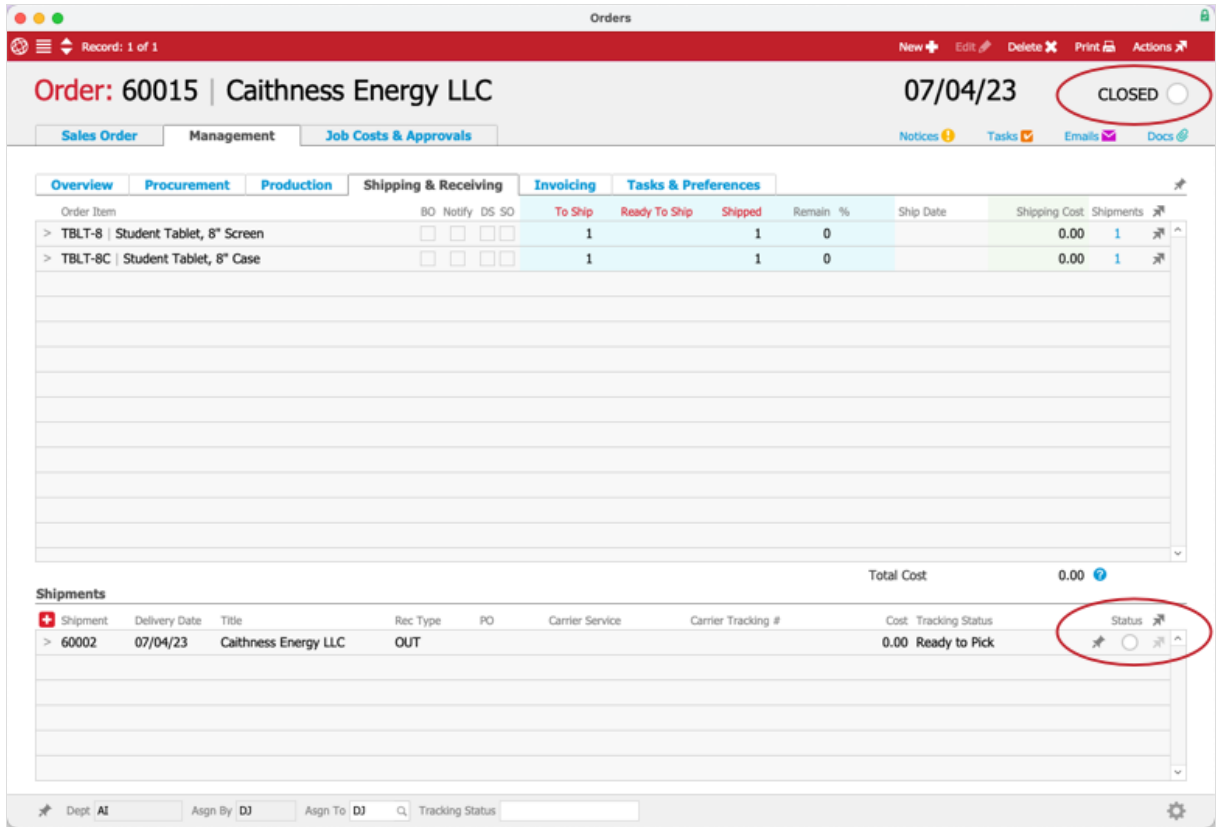
The screenshot shows the 'Shipping Log' application in detail view for shipment 60002. The header bar shows 'Record: 1 of 1' and the same action buttons. The main title is 'Shipment: 60002 | Caithness Energy LLC' with the date '7/4/2023' and status 'PENDING'. Below the title, there are tabs for 'Outgoing Shipment' and 'Incoming Shipment'. The 'Outgoing Shipment' tab is active. The form is divided into several sections: 'Ship To' (Caithness Energy LLC, 565 Khrystall Ave # 29, New York, NY 10017), 'Shipment Info' (Carrier, Carrier Service, Account #, Carrier Tracking (PRO) #, Delivery Date: 7/4/2023, Weight: 0.15, Shipping Cost: 0.00), and 'Description' (Trailer Number, BOL, Seal Number, Package Type, Package IDs). Below these sections is a 'Packing List' table with columns: Code, Description, Order, Quantity, Value, Weight, Shipping Cost, Bin, and Ref #(s). The packing list contains two items: 'Student Tablet, 8" Screen' (Quantity: 1, Value: 525.00, Weight: 0.15, Shipping Cost: 0.00, Bin: WH-2B) and 'Student Tablet, 8" Case' (Quantity: 1, Value: 14.26, Weight: 0, Shipping Cost: 0.00, Bin: WH-2D). At the bottom, there are filter options: 'Dept: AI-Shipping', 'Bin', 'Asgn To: KH', 'Tracking Status: Ready to Pick'.

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



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) 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

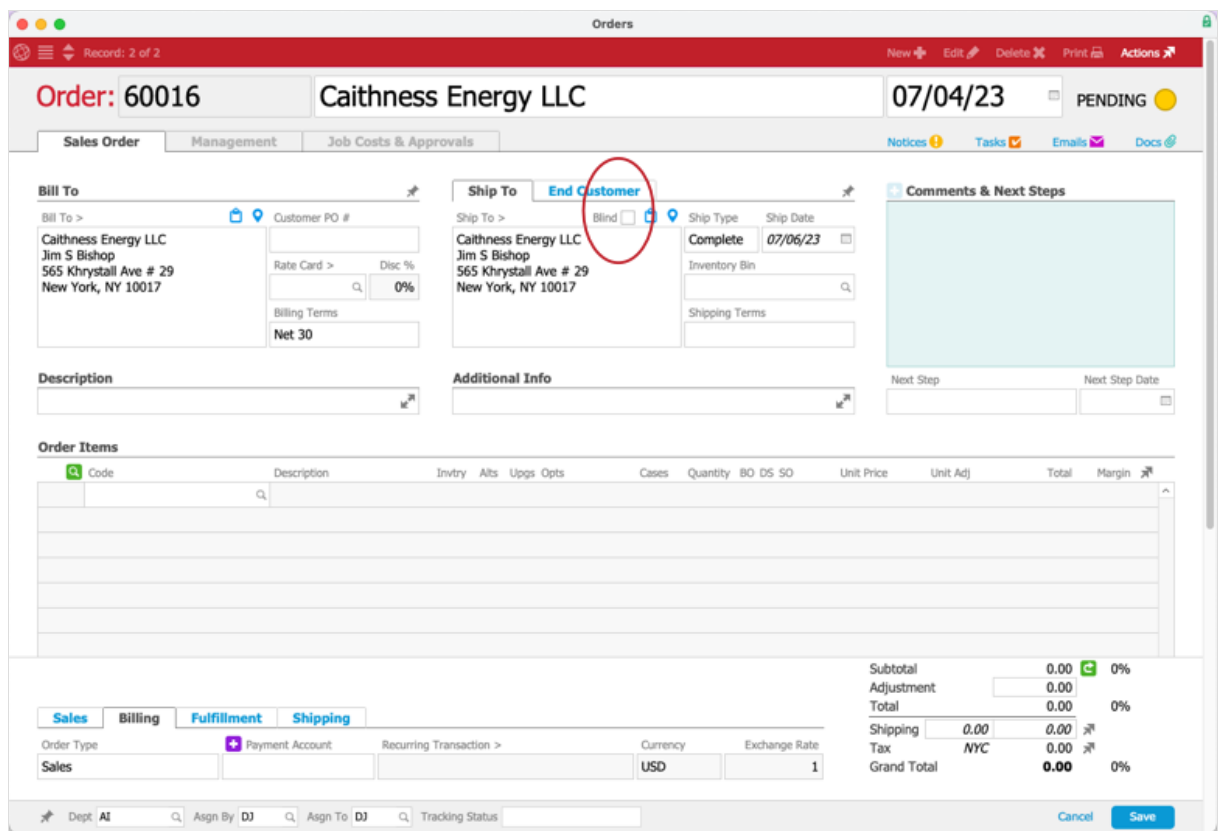
the purchasing tasks for the customer.

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.



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. **Ship Date:** 07/06/23. **Complete:** **Inventory Bin:** **Shipping Terms:**

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

Summary: Subtotal: 0.00, Adjustment: 0.00, Total: 0.00, Shipping: 0.00, Tax: NYC 0.00, Grand Total: 0.00

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.

Order: 60016 | Caithness Energy LLC 07/04/23 OPEN

Overview Procurement Production Shipping & Receiving **Invoicing** Tasks & Preferences

Code	Description	BO	DS	SO	Ordered	Procured	Produced	Shipped	Invoiced	Ordered	Invoiced	Remain
1 > BW-12p	Blue Widget - 12 pin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0/1			0/1	32.10	0.00	32.10

Subtotal	32.10	0.00	32.10
Adjustment	0.00	0.00	0.00
Total	32.10	0.00	32.10
Shipping	0.00	0.00	0.00
Tax	2.84	0.00	2.84
Grand Total	34.94	0.00	34.94
Order Balance			34.94
A/R Balance			0.00
Payment Due			34.94
Deposit Balance			0.00
Change Orders			0.00

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.

Order: 60016 | Caithness Energy LLC 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%				07/06/23	1

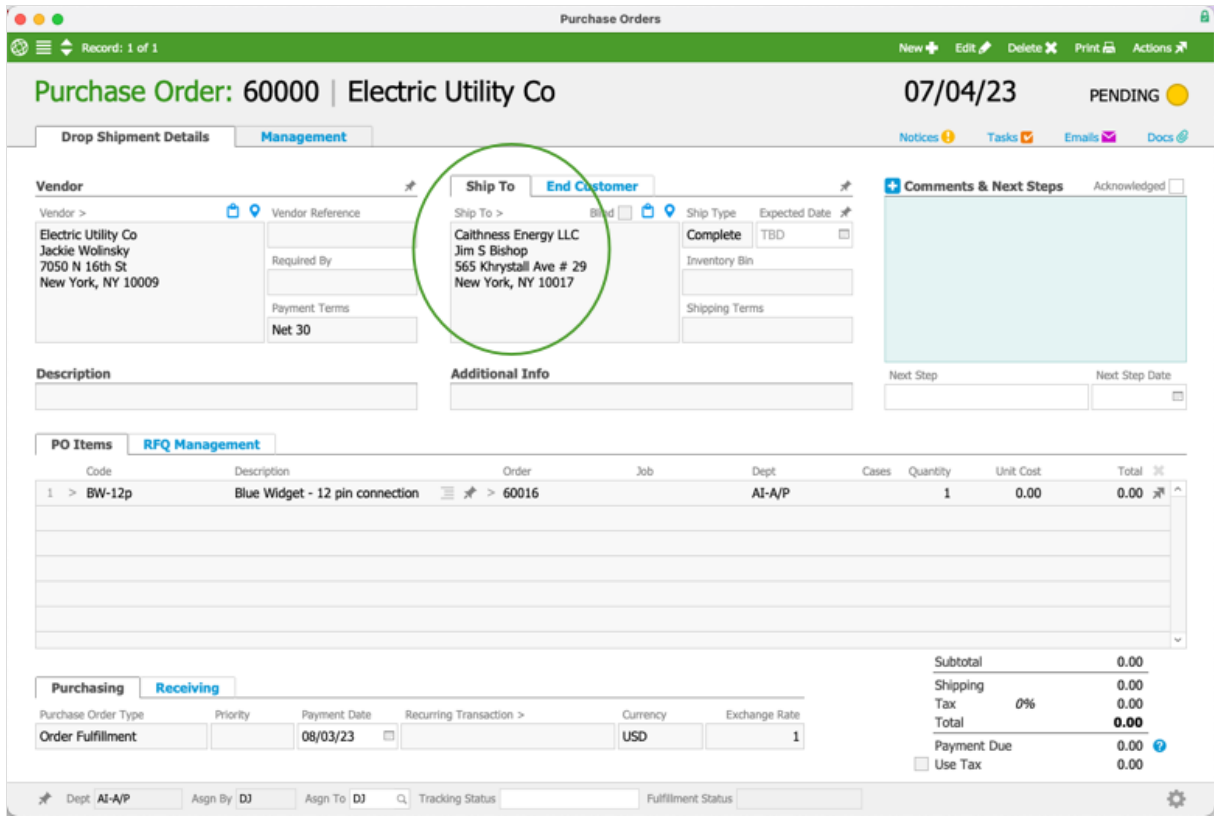
Purchase Orders

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

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.



9. In the PO module header bar, click **Actions > Open**.
10. When you see the confirmation dialog, click **Open**.

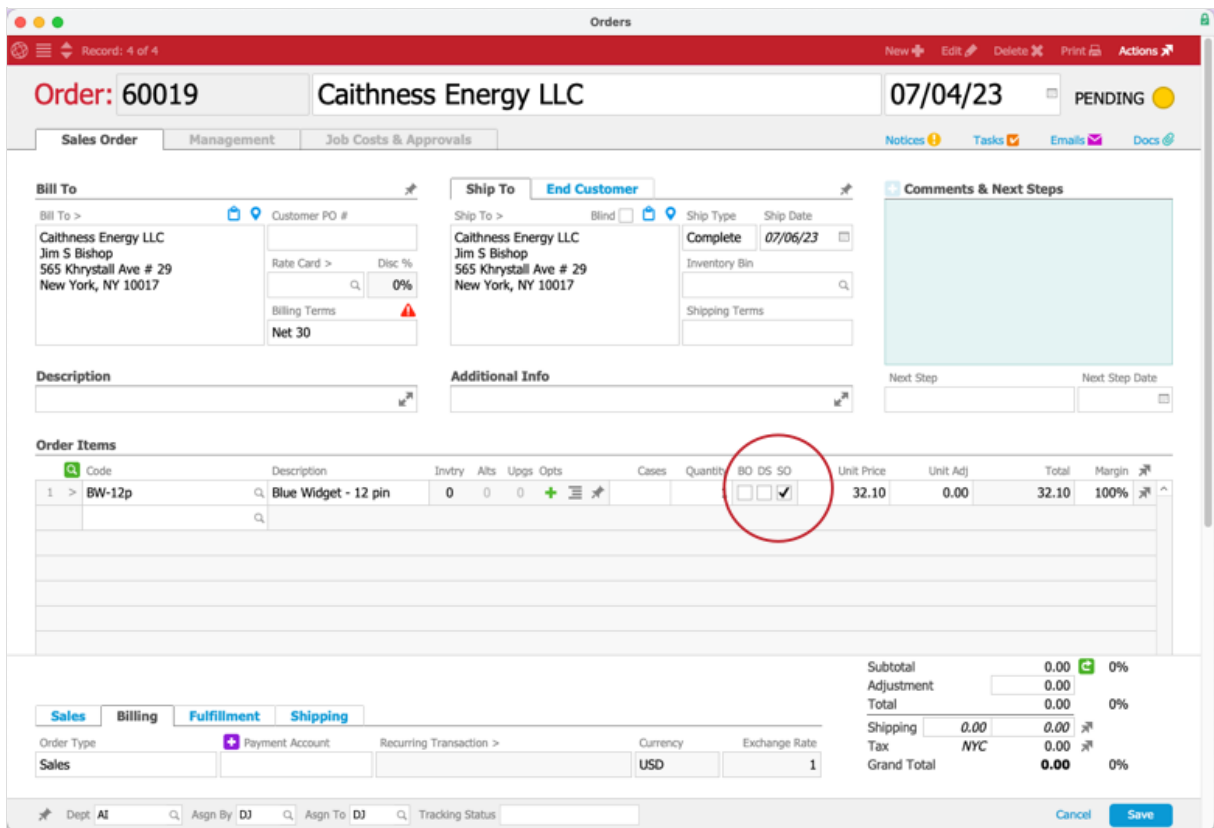
This workflow would continue with processing the purchase, as covered in the [Purchase Orders training guide](https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders) (<https://aace6.knowledgeowl.com/help/discovery-training-purchase-orders>). To further enhance drop shipping, you can add [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.



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.

Order: 60019 | Caithness Energy LLC 07/04/23 OPEN

Overview Procurement Production Shipping & Receiving **Invoicing** Tasks & Preferences

Code	Description	BO	DS	SO	Ordered	Procured	Produced	Shipped	Invoiced	Ordered	Invoiced	Remain
1 >	BW-12p Blue Widget - 12 pin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0/1		0/1	0/1	32.10	0.00	32.10

Subtotal	32.10	0.00	32.10
Adjustment	0.00	0.00	0.00
Total	32.10	0.00	32.10
Shipping	0.00	0.00	0.00
Tax	2.84	0.00	2.84
Grand Total	34.94	0.00	34.94
Order Balance			34.94
A/R Balance			0.00
Payment Due			34.94
Deposit Balance			0.00
Change Orders			0.00

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.

Order: 60019 | Caithness Energy LLC 07/04/23 OPEN

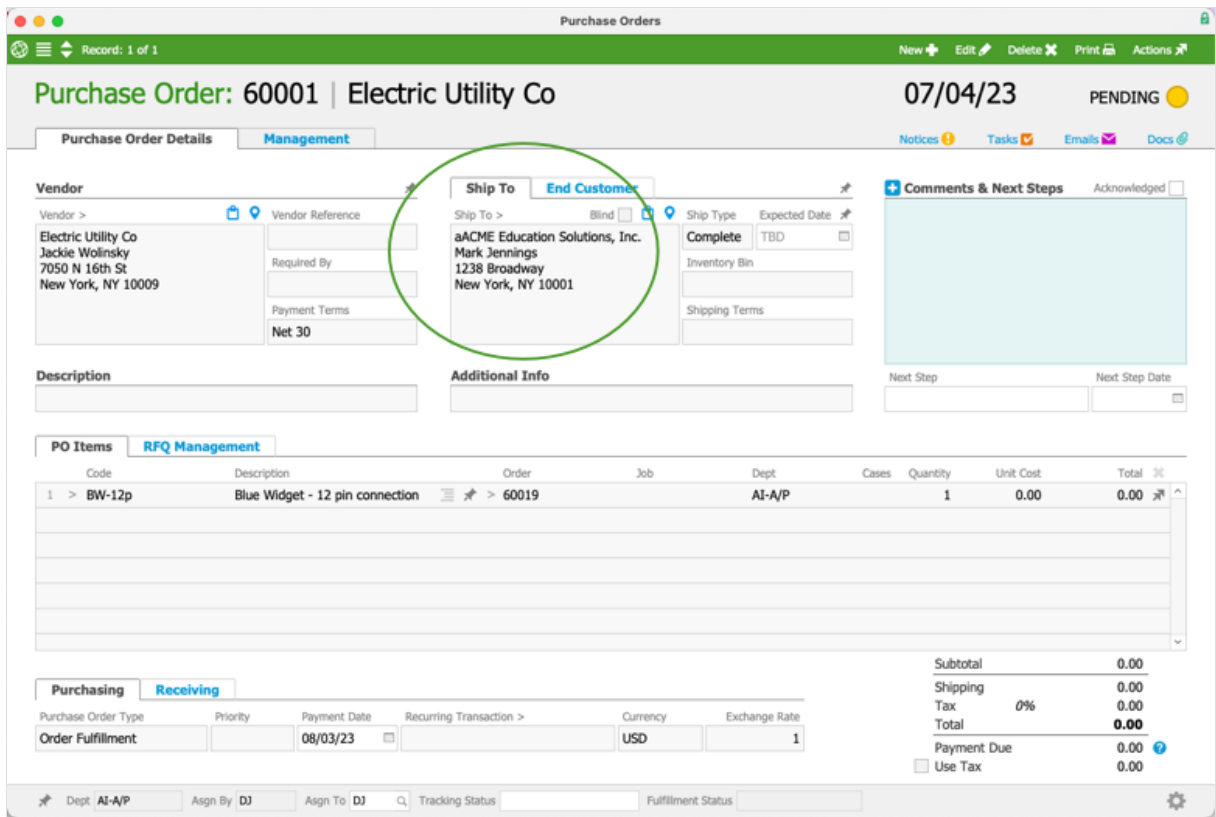
Overview Procurement **Production** Shipping & Receiving Invoicing Tasks & Preferences

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

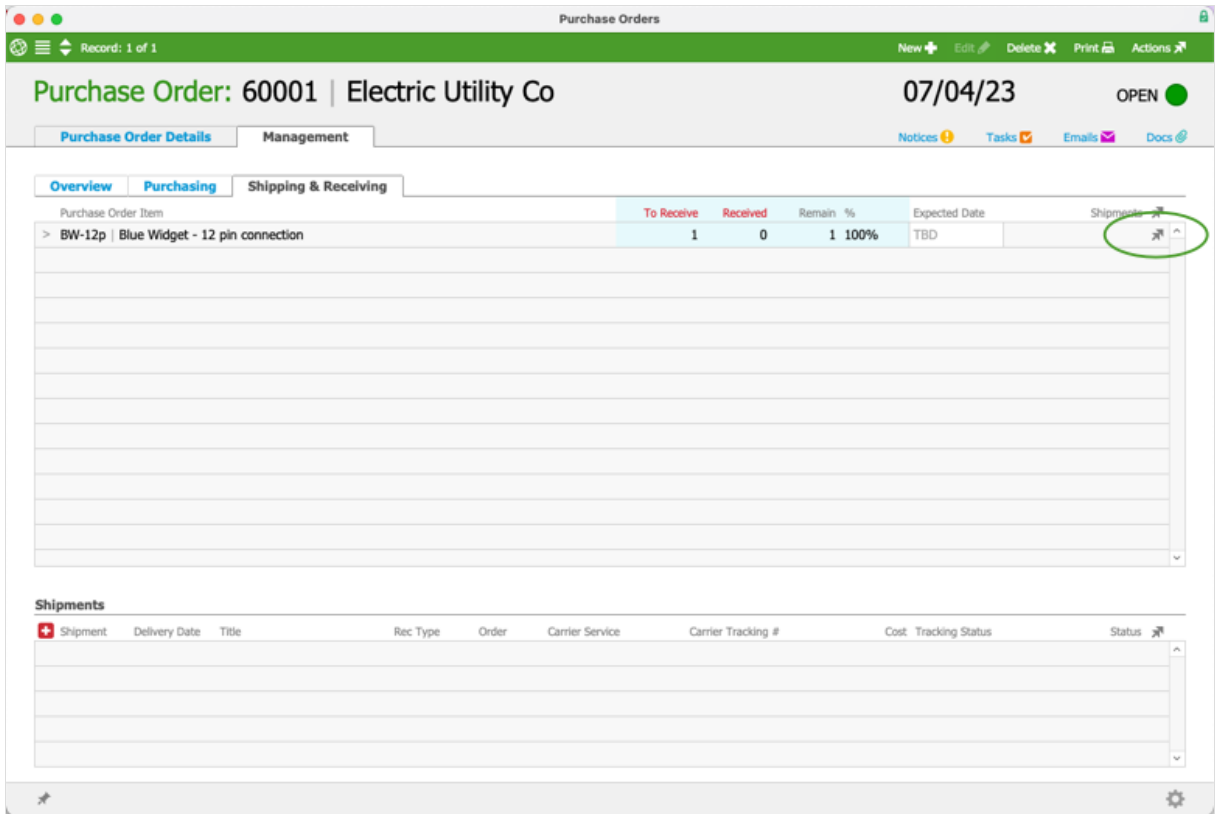
Purchase Orders

PO	Date	Title	Vendor	PO Total	Balance	Req By	Tracking Status	Status
> 60001	07/04/23	Electric Utility Co	Electric Utility Co	0.00	0.00			

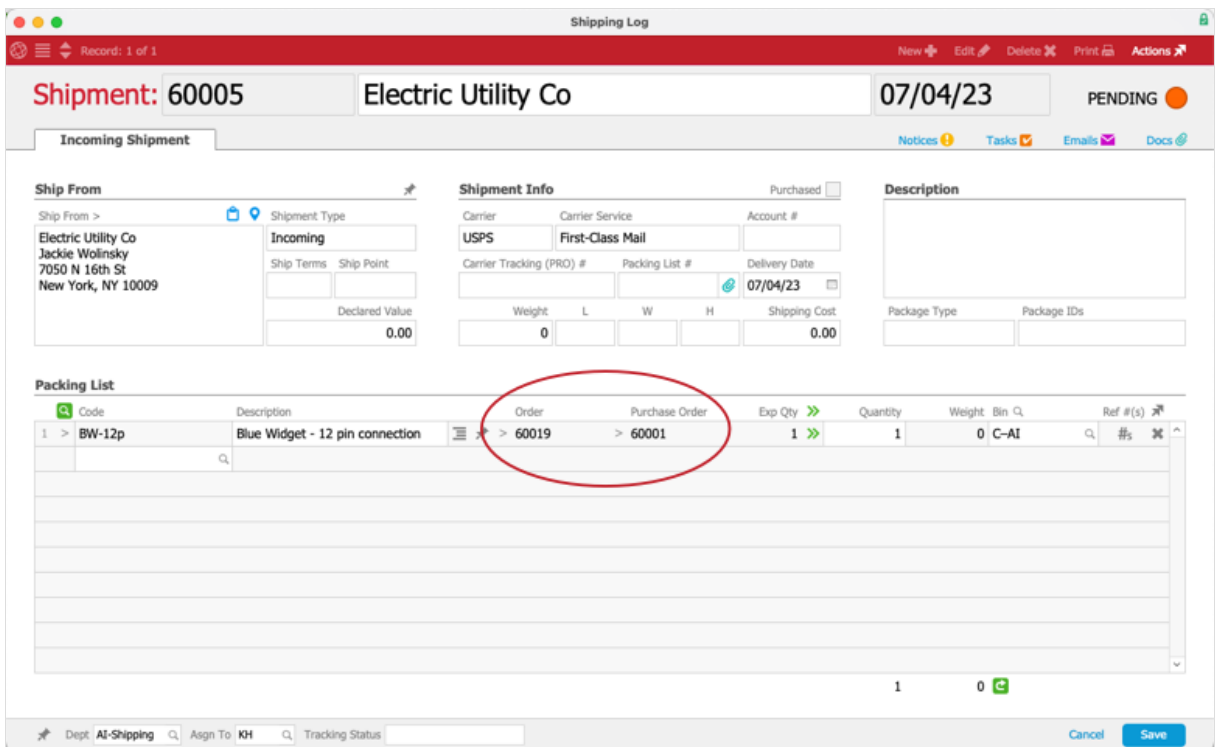
8. Click the **Go-To** arrow (>) for the auto-generated PO.
This displays the Purchase Orders module, showing the detail view of this PO. Note that the Ship To address is *your* company.



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**.



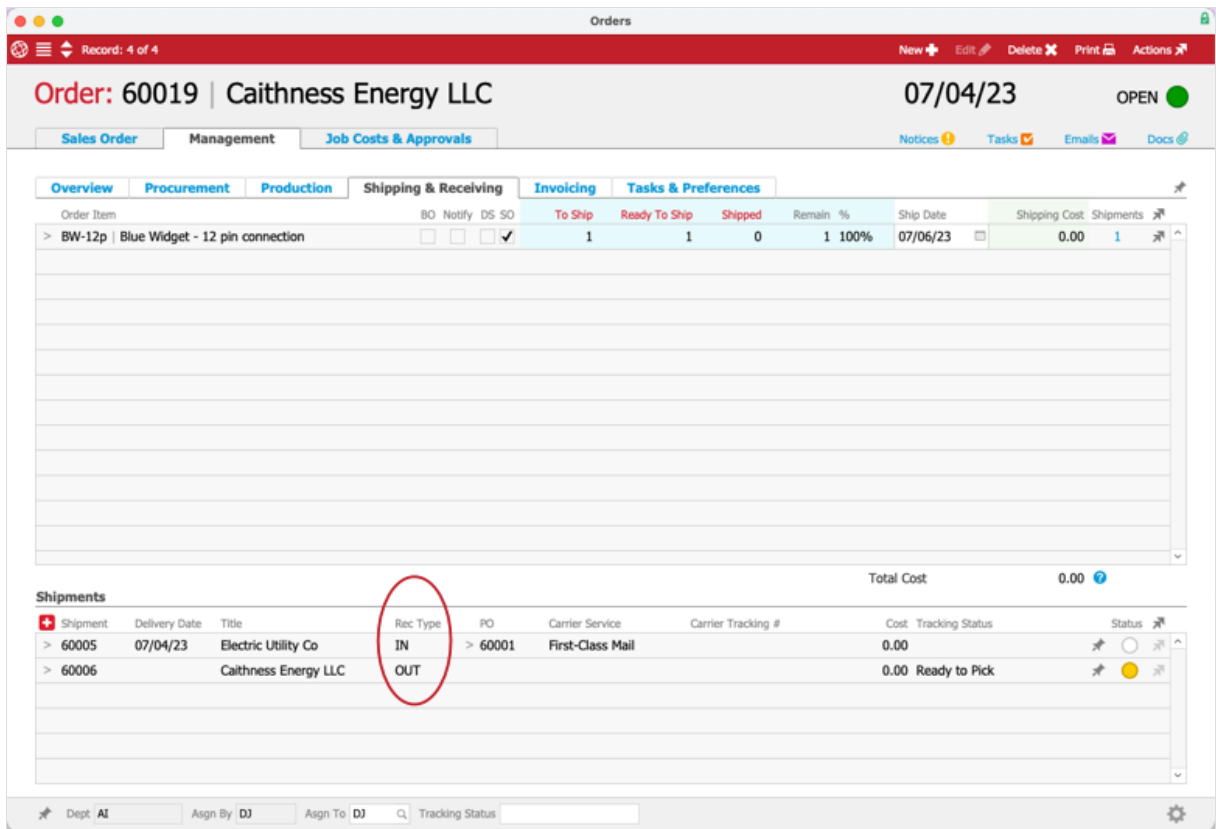
This displays the Shipping Log module, showing the incoming shipment for your SO item in Edit mode. The shipment is automatically linked to the initial sales order and to the PO.



- 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.

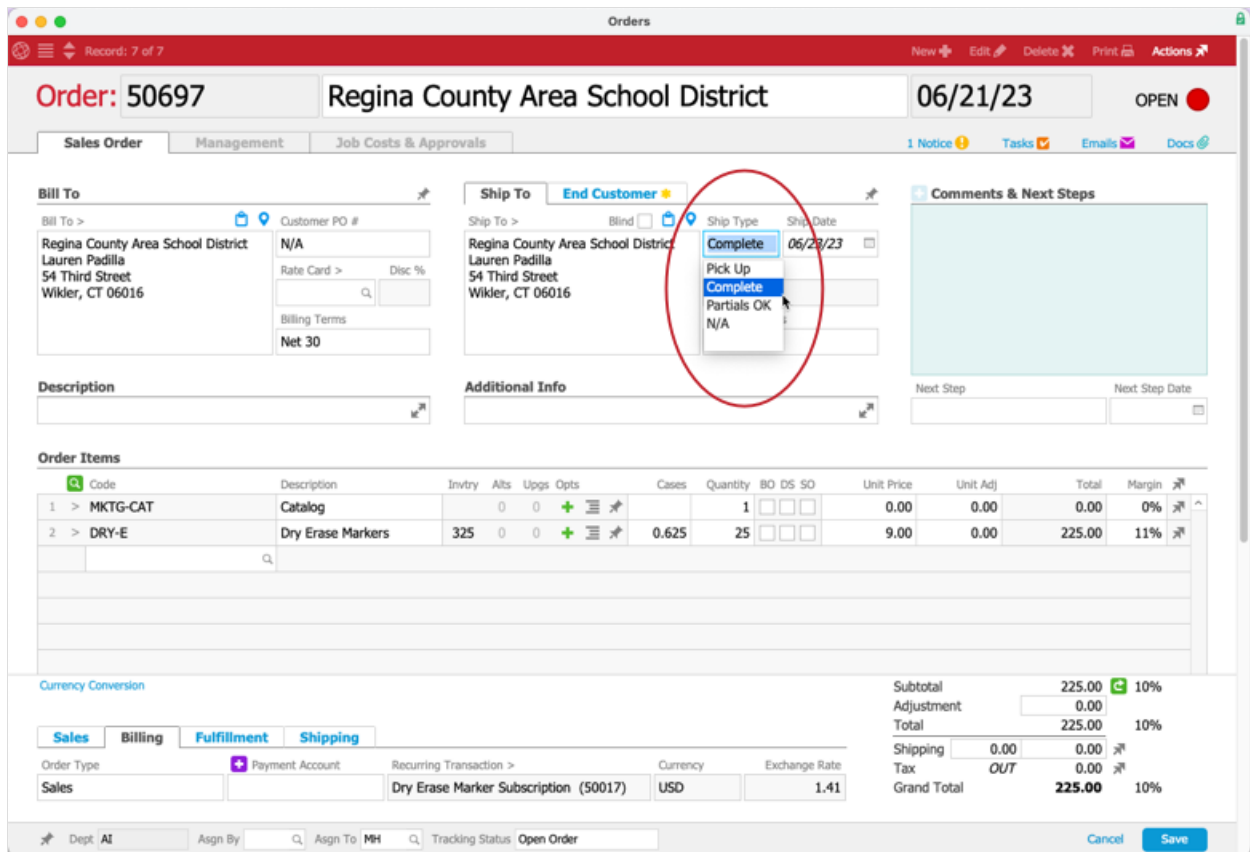


Note: In the Shipments portal, the Rec Type column labels the first shipment as 'IN' and the second shipment as 'OUT'. The 'IN' shipment represents receiving the SO item from the vendor. The 'OUT' shipment represents sending the SO item to the customer. Once you mark the incoming shipment as Received,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



- 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>)
