Reporting for the Orders Module

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This guide explains the available reports in the Orders module. It is intended for general users.

The Orders module in aACE 6 offers many reports or printing options for organizing order information.

Reports with an asterisk (*) are reports that have not been upgraded from aACE 5 to aACE 6. While most are still functional, review the actual data against the report to ensure the information is correct. If you need a report upgraded, submit a support ticket to support@aacesoft.com ().

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List View Print Options

To access the Print Options menu in the list view for the Orders module, from the Main Menu go to Order Management > Orders > Print.

Print Option	Description
Print this View	Prints the current list of orders using the Quick Search bar fields. The printout varies depending on the order list view the user is viewing, since the Quick Search bar fields also vary: Operations, Management, and Sales.
Print Orders in List	Prints the detail view Print this View report for each order in the list

Print Option	Description
Send Orders in List	Filters the list to Open orders and sends each order according to the Bill To company Send Docs Via field on the company record > Customer Details tab > Billing Setup. • Email — Customers get an email built from the email template. Companies with no value in the Send Docs Via field are treated as Email. Tracking Status for the order is updated to Sent via Email. • Mail — Left in the list for printing, and their Tracking Status is set to Sent via Mail.
Auto-Email Orders in List	Filters the list to Open orders and emails all orders. Tracking Status field is updated to Sent via Email. Orders that cannot be emailed (e.g. no email address) must be mailed separately.
Print to Mail Orders in List	Prints every order in the list for mailing. Updates order Tracking Status to Sent via Mail.
Send Sales Order Invoices in List	Filters the list to Open orders and sends each sales order invoice according to the Bill To company Send Docs Via field on the company record > Customer Details tab > Billing Setup. • Email — Customers get an email built from the email template. • Mail — Left in the list for printing
Auto-Email Sales Order Invoices in List	Filters the list to Open orders and emails all sales order invoices. Orders that cannot be emailed (e.g. no email address) must be mailed separately.
Print to Mail Sales Order Invoices in List	Prints every sales order invoice in the list for mailing
Print Commissions Summary Report	Commissions for the orders, summarized by payee and role. Users without the Order Oversight user group privilege see only their own commissions.

Print Option	Description
Print Commissions Detail Report	Detailed commissions for the orders, including line item codes, order item value, commission, paid, balance, and other values. Users without the Order Oversight user group privilege see only their own commissions.
Find WIP Orders	Locates orders to include in the WIP report
Print WIP Report	Work-in-Progress report as of a specified date, per order. Includes details on revenue and costs.

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List View Report Selector

To access the Report Selector in the list view for the Orders module, from the Main Menu go to Order Management > Orders > Print > Open Report Selector.

Report Name	Description
Time by Customer, Code	Time entries organized by customer, then by line item code
Time by Job	Time entries organized by job
Time by Job, Code	Time entries organized by job, then by line item code
Orders Overview	General information about the orders, including order ID, date, customer, title, status, and grand total.
Orders Management Overview	Information displayed on the order Management tab. Includes details on line item codes, shipped values, procured values, produced values, invoiced values, and other totals.
Orders Management Overview by Customer	Information displayed on the order Management tab, organized by customer. Includes details on line item codes, shipped values, procured values, produced values, invoiced values, and other totals.

Report Name	Description
Order Est Margin By Sales Rep, Customer	Margin, estimated revenue, and cost information organized by sales representative, then by customer
Order Act Margin By Sales Rep, Customer	Margin, actual revenue, and cost information organized by sales representative, then by customer
Job Cost Time & Materials Summary	Labor and cost, displayed to compare
Job Cost Summary by Order, Code: Budgeted vs. Actual (Qty Only)	Budgeted and actual quantity for each order, organized by line item code with variance. No dollar values.
Job Cost Summary by Order, Code: Budgeted vs. Actual	Budgeted and actual quantity and cost for each order, organized by line item code with variance
Shipping & Invoicing Accruals by Customer	Shipped order items but not yet invoiced. Organized by customer and order.
Monthly Orders by Sales Rep, Customer	12-month view of monthly order totals, organized by sales representative then by customer.
Order Subtotals Summary*	Order totals, including subtotal, tax, shipping, adjustments, and the grand total
Order Billing Summary*	Various grand totals, balances, and payments, organized by customer
Order Shipping Margin by Customer*	Shipping revenue and cost for each order, organized by customer
Orders by Assigned By and Billing Terms*	Order totals and billing status, organized by the Assigned By field team member, then by billing terms

Report Name	Description
Orders by Sales Rep and Billing Terms*	Orders organized by sales representative, then by billing terms
Pending Order Inventory Forecast - Summary*	Inventory demand for Pending orders by line item code. Quantity needed vs on hand.
Pending Order Inventory Forecast - Detail*	Inventory demand for Pending orders by line item code. Quantity needed vs on hand with additional details.
Backorder Fulfillment Report*	Backordered items, order, and customer details, organized by line item code and fulfillment priority
Job Cost Detail by Order*	Job cost entries with labor, materials, unit cost, and total, organized by order
Time by Order*	Time entries organized by order, with information including team members, jobs, and labor
Time by Order, Team Member*	Time entries organized by order, then by team member
Actual Time and Material Costs*	Actual time and material costs, organized by order

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Detail View Print Options

To access the Print Options menu in the detail view for the Orders module, from the Main Menu go to Order Management > Orders > locate the order record > select the Go-To icon (>) for the order > Print.

Print Option	Description
Print this View	Prints the current order

Print Option	Description
Email Order	Opens the aACE Email Composer with the order printout attached as a PDF
Email Sales Order Invoice	Opens the aACE Email Composer with the sales order invoice printout attached as a PDF. Only available on sales, production, and service orders.
Print Sales Order Invoice	Prints the sales order invoice, with information about invoicing and the order. Only available on sales, production, and service orders.
Print Pick List	Prints a warehouse pick sheet, with information including a list of items and quantities and bin location. Only available on sales orders.
Print Lump Sum Change Order	Only available on change orders
Print Quote Review	Only available on change orders
Print Technical Order Review	Only available on change orders

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Detail View Report Selector

To access the Report Selector in the detail view for the Orders module, from the Main Menu go to Order Management > Orders > locate the order record > select the Go-To icon (>) for the order > Print > Open Report Selector.

The Report Selector is not available for change orders.

Print Option	Description
Time by Customer, Code	Time entries organized by customer, then by line item code
Time by Job	Time entries organized by job

Print Option	Description
Time by Job, Code	Time entries organized by job, then by line item code
Orders Overview	General information about the orders, including order ID, date, customer, title, status, and grand total.
Orders Management Overview	Information displayed on the order Management tab. Includes details on line item codes, shipped values, procured values, produced values, invoiced values, and other totals.
Orders Management Overview by Customer	Information displayed on the order Management tab, organized by customer. Includes details on line item codes, shipped values, procured values, produced values, invoiced values, and other totals.
Order Est Margin By Sales Rep, Customer	Margin, estimated revenue, and cost information organized by sales representative, then by customer
Order Act Margin By Sales Rep, Customer	Margin, actual revenue, and cost information organized by sales representative, then by customer
Job Cost Time & Materials Summary	Labor and material time and cost, displayed to compare
Job Cost Summary by Order, Code: Budgeted vs. Actual (Qty Only)	Budgeted and actual quantity and cost for each order, organized by line item code with variance. No dollar values.
Job Cost Summary by Order, Code: Budgeted vs. Actual	Budgeted and actual quantity and cost for each order, organized by line item code with variance
Shipping & Invoicing Accruals by Customer	Shipped order items but not yet invoiced. Organized by customer and order.
Order Subtotals Summary*	Order totals, including subtotal, tax, shipping, adjustments, and the grand total

Print Option	Description
Order Billing Summary*	Various grand totals, balances, and payments, organized by customer
Order Shipping Margin by Customer*	Shipping revenue and cost for each order, organized by customer
Orders by Assigned By and Billing Terms*	Order totals and billing status, organized by the Assigned By field team member, then by billing terms
Orders by Sales Rep and Billing Terms*	Orders organized by sales representative, then by billing terms
Pending Order Inventory Forecast - Summary*	Inventory demand for Pending orders by line item code. Quantity needed vs on hand.
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Time by Order*	Time entries organized by order, with information including team members, jobs, and labor
Time by Order, Team Member*	Time entries organized by order, then by team member
Actual Time and Material Costs*	Actual time and material costs, organized by order