



***ACE SELECTION  
ORDERING PROCESS***

# Creating an order in ACE

We recommend a quote be completed before placing an order through ACE.

1. To access your quote, click the [Quotes](#) button:

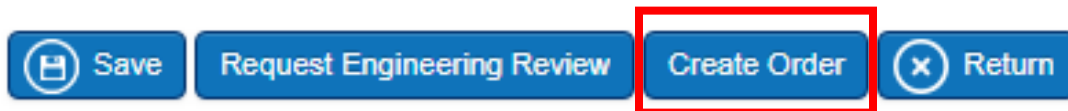
## Project Schedule

Project: test050818



2. All the quotes created for the project will be listed. Click the magnifying glass icon for the quote that will become an order to open the [Quote Worksheet](#).
3. In the [Quote Worksheet](#) at the bottom of the page click [Create Order](#).

All sales subject to terms of sales agreement



4. A confirmation window will show up. Click Yes.

**Confirm**

Are you sure you want to create a new order?

5. The **Order Worksheet** will open. Complete the fields required.

a. Order Information: complete required fields\*, such as “Purchase Order”.

Customer Information			
<b>Sell To</b>		<b>Ship To</b> <a href="#">Same as Sell To</a> <a href="#">Search</a>	
Customer Account:			
Name:	Juan Hincapie *	Location Name:	
Company:	Addison Engineering Test *	Company:	
Address 1:	7050 Overland Road *	Address 1:	
Address 2:		Address 2:	
City:	Orlando *	City:	
State:	FL ▼	State:	Select A State ▼ *
Zip:	32810 *	Zip:	
Country:	United States ▼	Country:	United States ▼
Tax Exempt:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contact Name:	
Tax Certificate #:	None	Contact Phone:	
<b>Ship Via</b>		<a href="#">Special Order Instructions</a>	
Ship Via:	Best Way ▼	<b>Split Shipments</b>	
Lead Time:	None ▼	In the event units have different scheduled ship dates, will a split shipment be acceptable ? <input type="checkbox"/> Yes	
Customer Freight Account Number:		**Please note split shipments may incur additional freight charges**	

Order Information			
Order Number :	3646	Status:	Open
Factory Order Number :		Order Status (ERP):	Open
Date :	5/22/2018	Project Name:	test050818
Transaction Type:	Buy / Resale ▼ *	Purchase Order:	
Ship Date :		Job Name:	test050818- 1- 1 *
Tracking Number :			

b. Rep/Customer Information: complete required fields\*, such as “Ship To” information.

c. Rep Information: will be auto populated.

Rep Information			
Rep Company:	Addison Engineering Test	Rep Phone:	407.292.4400 ext.44
Rep Contact:	Juan Hincapie	Fax:	407.299.6178
Regional Sales Manager:	Arcenio Calderon, Jr. ▼	Rep Email:	juan.hincapie@addison-hvac.com

- d. Order Details: lists the unit(s) included in the order, including quantities, code string and prices.

Order Details					
Line Item Summary					
Qty	Tag	Description	List Price	List Adds	Total
1	AHU-02	PROA600H6A2BEBHAG2B40DTB0H23000C00000000000000A00000	\$54,542.67	\$0.00	\$54,542.67
1 - 1 of 1 items					

- e. Accessories: all accessories considered in the quote will be transferred to this section.
- f. Net Adds and Special Engineering Requests will be listed in this section, if any, as they were stated in the quote.
- g. Pricing Summary

Pricing Summary			
All Pricing in USD \$		Current	Requested
Total List Price	\$	54,542.67	54,542.67
Multiplier Approved		1.000	1.000
Sub-Total Net	\$	54,542.67	54,542.67
Net Adds	\$	0.00	0.00
Special Engineering Requests	\$	0.00	0.00
Total Net Price	\$	54,542.67	54,542.67
Estimated Freight	<input type="checkbox"/> Freight Quoted - Quote Number	\$ 0.00	0.00
Total Price	\$	54,542.67	54,542.67
Estimated Commission	\$	0.00	0.00

- h. Rep Checklist: this section allows uploading of supporting documents such as customer purchase order, approved submittals, custom quotes, etc.

Rep Checklist			
Select File	File Name	Select a Documentation Type	Upload

6. Click "Submit Order".

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Save	Request Engineering Review	Submit Order	Return
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7. The Regional Sales Manager and the Addison order processing team will receive an email notification the order was placed.
8. If the order processing team needs additional information, the order will be sent back to the customer through ACE. An email notification of what is required will be generated.
9. The Rep must go back to the order, complete the requested information and resubmit.

## Project Schedule

Project: test050818



Project Information



Users



Quotes



Orders



Submittal

ACE Interface - Your order reference #3646 for job test050818- 1- 1 status has changed.

Order snapshot:

Order New Status:	Customer Review Required
Job Name:	test050818- 1- 1
Factory Order Number:	
PO Number:	PO test 052218
Order Net Total:	\$54,542.67
Notes	Attach PO

Please review your order in the ACE Interface and take the necessary actions as soon as possible.

### Statuses Legend

1. **Customer Review Required:** The engineering or order entry team requires the rep to review the above order and update the necessary information shown in the above notes. Once the updates are performed, please re-submit the order for review and approval
2. **Credit Review:** The order entry team has moved your order to credit review. If they need additional information from you, they will contact you.
3. **Approved:** The order entry team has reviewed and approved the above order for processing.

10. Once the order and required documents are correct and completed, the order will be approved by the order processing team. An email notification will be sent to Rep and RSM stating the status of the order.
11. A work order number will be generated which will become the serial number of the unit(s) and the Factory Order Number on the order sheet in ACE.

Order Information	
Order Number :	3646
Factory Order Number :	<div></div>
Date :	8/28/2018
Transaction Type:	Buy / Resale ▼ *
Ship Date :	
Tracking Number :	

i.e. 1808015