aACE™

Complete Business Management Suite

Getting Started

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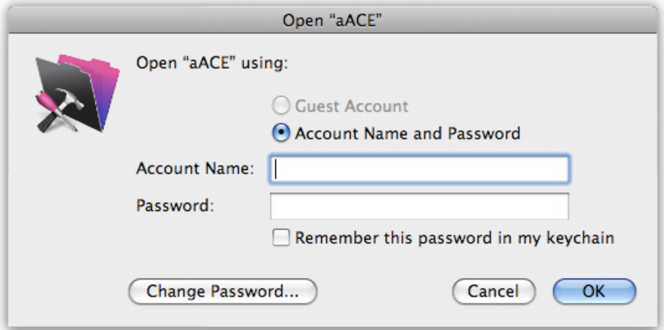
Getting Started with aACE

Logging In

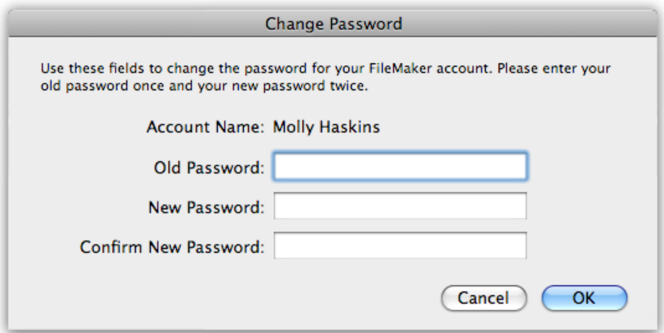
1. Double-click the **aACE** icon.
2. A dialog box appears prompting you for a Login **Name** and **Password**.
3. Enter the information provided by your IT department and click **OK**.



The first time you log in, the system prompts you to change your password.

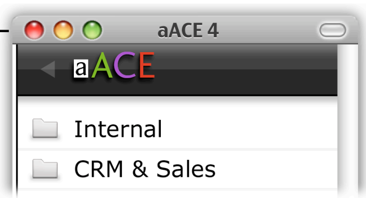
4. Enter your current password, your new password, and confirm your new password by retyping it.
5. Click the **OK** button.

*Note: You can change your password at any time by navigating to **myACE** > **Change Password**.*



Logging Out

Close the **Main Menu** to log out of aACE.



The Main Menu

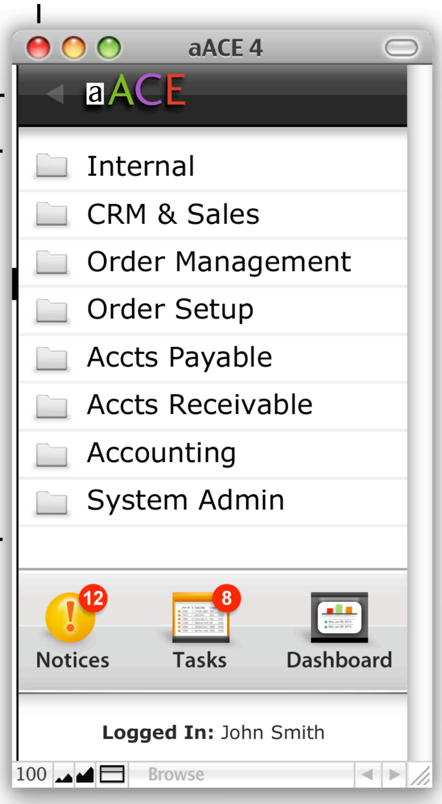
The **Main Menu** is the primary navigation tool used in **aACE**. The menu appears when you first enter the system and remains on the screen. Menu selections and buttons will vary with each user's profile.

Click to log out.

Click arrow to return to the top level of the menu.

The **Main Menu** uses drill-down navigation. Click **CRM & Sales** to view a sub-menu where you can access Companies, Contacts and other related CRM modules.

Quick links to view your Notices, Tasks and Dashboard.

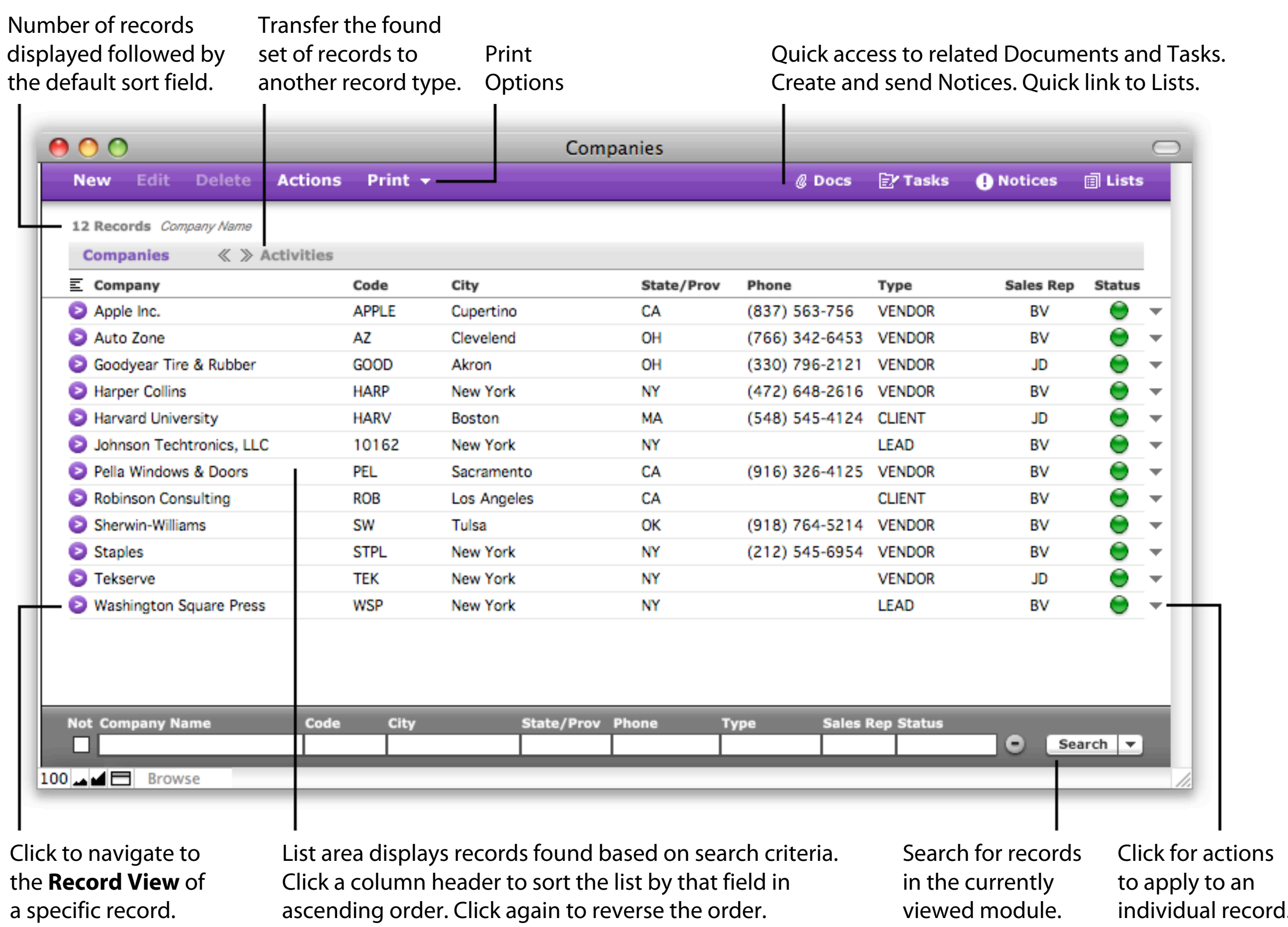


Module Basics

Two screen views, **List View** and **Record View**, are used system-wide and utilize the following conventions.

List View

The **List View** is the first screen you typically see when launching a module. The **List View** assists you in locating records. Shown below is the Companies module, however most **List View** screens contain these same features.



Search

At the bottom of every List View screen is a **Search** area containing fields that are commonly searched.

Performing a "Not" Search. Select the "Not" checkbox at the far left side to find records that do not match the criteria you enter.

Search Options. Click the dropdown arrow to the right of the Search button for additional search options.

> **Refining your list.** Enter your search criteria and then select "Search within Current List." This will search only the records in your current found set.
>
> **Add to your found list**. Enter your search criteria and then select "Search including Current List." Newly found records are added to your existing list.

Search Operators

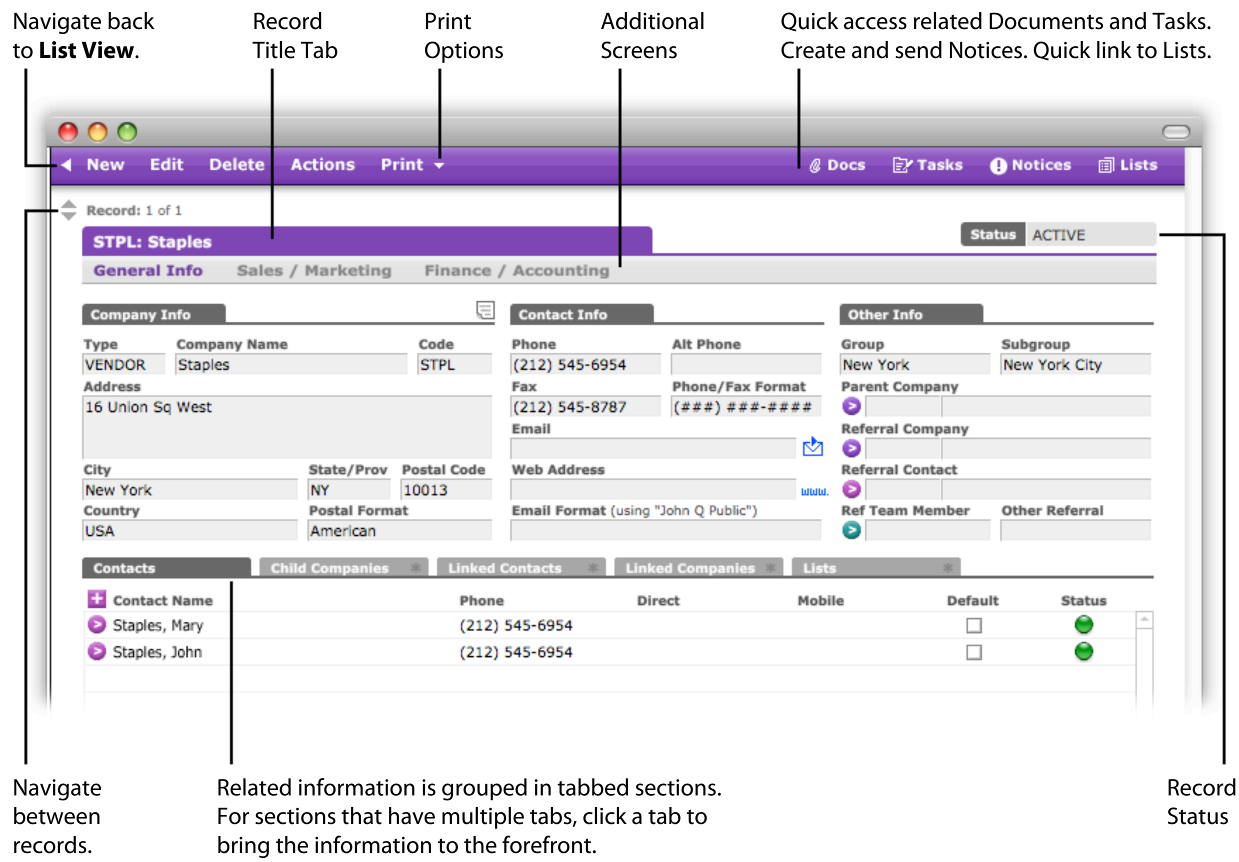
Listed below are common search operators which aid in performing more refined searches. Please see FileMaker help documentation for additional search operators.

Symbol	Operator Name	Definition	Example Scenario	Field to Search	Criteria to Enter
<	Less than	Finds values less than what you enter	Search for invoices totaling "less than" $1500.00	**Balance**	<1500.00
<=	Less than or equal to	Finds values less than or equal to what you enter	Search for all timesheets dated 3/1/2010 or earlier	**Date**	<=3/1/2010
>	Greater than	Finds values greater than what you enter	Search for timesheets with more than 3 hours	**Hours**	>3
>=	Greater than or equal to	Finds values greater than or equal to what you enter	Search for invoices totaling $1500.00 or more	**Balance**	>=1500.00
=	Exact match	Finds exact match to what you enter	Search for a category with the word "Market" in the title Or, search for invoices totaling $500.00	**Category Name** *Results could include "Market Research" but not "Marketing"* **Balance**	=market =500.00
...	Ellipse	Finds records within a range.	Search for records between two dates Or, search for invoices #10000 through 10003	**Date** **Invoice #**	1/1/2010…1/9/2010 1000…1003
!	Duplicates	Finds records with duplicate field values	Search for duplicate company records	**Company Name**	!
//	Today's date	Finds records with today's date.	Search for all Company records entered today	**Creation Date**	//
@	Single character variable	Replaces a single unknown or variable character	Search for a name when spelling is unknown – Example: "Gray" or "Grey"	**Name**	Gr@y
*	Unlimited character variable	Replaces unlimited number of unknown characters	Search for a name when spelling is unknown – Example: Schwartz__?__ Or, search for a name containing the letters "son"	**Name** *Results include all names starting with "Sch"* **Name** *Results would include names such as "Ronson" or "Richardson"*	sch* *son*
"criteria"	Literal entry	Finds all criteria entered between the quotation marks, often used for spaces and punctuation	Search for a hyphenated last name Or, search for a company with a comma in the name	**Last Name** *Results include all last names containing a hyphen* **Company Name** *Results would include names such as "Smith, Brown and Jones"*	- ,

Record View

The **Record View** displays information for a single record. It is the primary screen for interacting with data.

Navigate to the **Record View** from the List View by clicking the button to the left of the desired record. Shown below is the Companies module, however most **Record View** screens contain these same features.

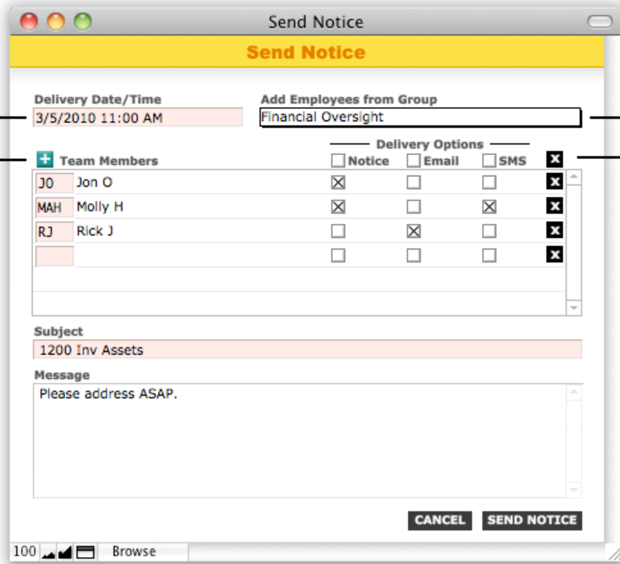


Sending Notices

Use the Send Notice popup window to send notices to other aACE users. Options are provided for selecting recipients and mode of delivery. A subject is required, however a message is optional.

Delivery time is set automatically to the current date and time but can be changed.

Click to select recipients individually.



Click to select a group of individuals to receive the notice.

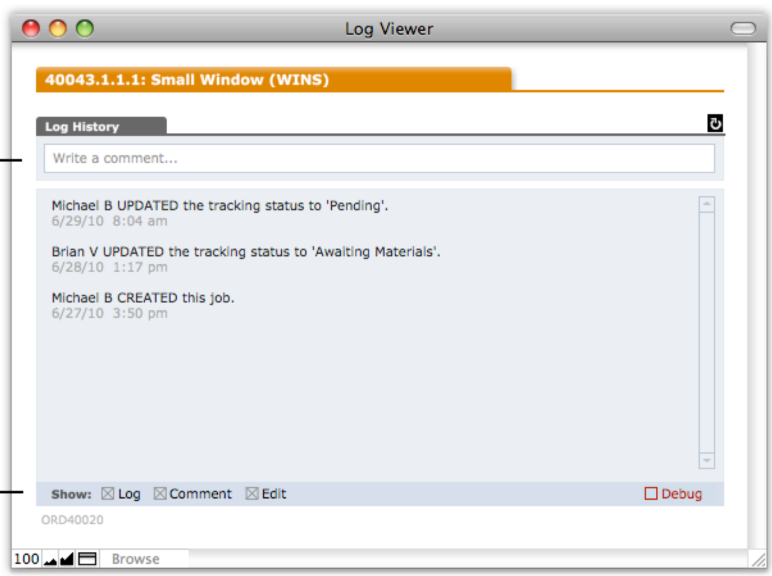
Select one or more delivery options.

Log

Open the Log Viewer to see the history of a record. Record status changes are noted here as are user comments and edits to the record data.

Comments can be added here as well as directly into some module screens.

Check boxes allow for filtering log entries.



Action Buttons

The following action buttons are found at the top of most modules.

New

Click the **NEW** button to create a new record.

Field colorization. Pink fields are required, gray fields are not editable and white fields are optional.

Dropdown menus. Some fields contain dropdown menus from which a selection can be made.

Default values. Some fields may carry default values. In some cases, these values can be over-ridden.

After entering the data, click the **Save** button at the bottom right. You are then returned to the **Record View** of that record you just created.

Edit

Click the **EDIT** button to make revisions to a record. When finished, click the **Save** button at the bottom right.

Delete

From the **Record View**, click the **DELETE** button to delete a record.

During the deletion process, the system verifies that: 1) you have the necessary access privilege and,
2) the record has a status level permitting deletion.

Example: "PENDING" invoices may be deleted but "OPEN" invoices cannot. If you attempt to delete an "OPEN" invoice, the system will display an error message. Otherwise, it will delete the record and return you to the **List View** or **Record View**, depending on the size of your current found set.

***Note**: Once a record is deleted from the system, the record is gone. This action cannot be undone.*

Actions

The **Actions** dropdown menu allows you to perform tasks related to the record you are viewing or a list of records if you are in **List View**. The menu options change relative to the screen view.

Print

Click the **Print** button to print the current view.

Click the dropdown arrow to the right of the **Print** button for additional printing options.

Record Status Levels

Records that have an event-driven life cycle typically use the following status levels:

Status Level	Significance
PENDING	The record is in the process of being created. It is not yet considered "real."
OPEN	The record is "real," current, and awaiting some event before being closed.
CLOSED	The closing event has occurred and the record is no longer current.

Example: An Invoice is "PENDING" while data is being input; it is "OPEN" once data has been properly input and carries a balance due; and it is "CLOSED" when the Invoice has been paid or is otherwise at a zero balance.

Typically, the system will prompt you to open a record after you complete the data entry process. Closing a record usually happens automatically when the closing event occurs.

Records that do not have an event-driven life cycle typically use the following status levels:

Status Level	Significance
PENDING	The record is in the process of being created. It is not yet considered "real."
ACTIVE	The record is "real" and current.
INACTIVE	The record is no longer current.

Example: A Company record is "PENDING" while data is being input; it is "ACTIVE" once data has been properly input and is ready to be used; and it is "INACTIVE" when the Company is no longer considered valid.

Typically, the system will prompt you to activate a record after you complete the data entry process. Deactivating a record requires selecting the appropriate option from the **Task Options** drop-down menu.