



Terminology

aACE	The premier business software suite developed by Avant Garde Information Solutions, LLC.
aACE Preferences	System settings that define system functionality and behavior.
Account	A record that is used to track vendor purchasing or customer billing. Features automated recurring purchasing and billing respectively.
Activity	A time stamped notation entered in a record log that is also viewable in the Sales/Marketing tab of the related Company and/or Contact.
Assembly Item	An item that requires building. Can track needed labor and parts. Can be used to build other assembly items.
Campaign	A record that tracks a specific marketing effort for profitability.
Category	A record that defines an item or service that you buy and/or sell.
Client / Customer	The paying entity (represented by a Company record) receiving goods and services. Client and customer terms are used synonymously.
Comment	A time stamped notation entered in a record log.
Company	An entity that is your client or customer, vendor, or some other formal relationship. Company records are attached to transactional records (leads, orders, invoices, receipts, purchases, disbursements, etc) and the work orders related to the transactions.
Contact	A real person. A contact record is most often attached a Company record.
CRM	An acronym for Contact Relationship Management.
Data Set	A group of records that share one or more common criterion.
Disbursement	An entry that records the outflow of funds. These records affect the accounting system.
Estimate	A written statement indicating a likely price for goods, services, and projects. Pending orders attached to sales leads are referred to as Estimates.
Estimate / Quote	Typically attached to a Lead. A pending order that is waiting to be approval by the customer.

Invoice	A billing record listing items and services with respective pricing and total amount due.
Job	A record used to manage the fulfillment of an order. Tracks associated budgets, costs, procurement, and tasks.
Launcher	The desktop icon that launches aACE Business Suite
Lead	AKA Sales Lead. This is a specific business opportunity that will most likely have pending orders referred to as estimates.
List	A collection of company or contact records. Typically used for mailings or marketing campaigns.
Log	A historical tracking of comments and activities attached to a record. All entries are time stamped.
Notes	Field level notations. Yellow icons indicate stored information.
Notice	A message generated by the system or by a user and sent to one or more aACE Team Members or notice groups using one or more delivery methods (aACE Notice, email, or SMS).
Notice Group	A collection of Team Members with common oversight responsibilities.
Order	A single transaction of one or more items or services sold to a customer/client. Often grouped as part of large scale Projects.
Office	A record that identifies a specific location. Can also be used to segregate departments or cost centers.
Project	A record used to manage a large scale undertaking, typically requiring budgets and multiple orders with related jobs.
Purchase	A record that reflects actual expenses related to the purchase of specific items or services. aACE Purchase records affect the accounting system.
Purchase Order	A record that reflects an anticipated purchase of specific items or services. aACE POs are tracked as estimated costs and do not affect the accounting system.
Rate Card	A record containing a predefined pricing scheme. Can be linked to a Company or an order.
Receipt	A record of funds received from a paying entity.
Sales Order	A business transaction representing a sale of goods or services to a customer.
Shipping Log	A record that tracks the delivery of items, both incoming and outgoing. Entries affect inventory counts for items marked as Inventory Items.
Task	A record linked to Leads or Jobs that track the completion of a single item of work. Can have assigned time budgets.
Task Group	A group of tasks assembled as a template which defines an order of operation, the normal time allotments and stated labor budgets. Can be linked to Categories, Orders, Leads.

Tax Profile	A record containing a predefined sales tax structure. Can be linked to a Company. Can also be selected at the Order level.
Team Member	An employee or external resource tracked in aACE. May or may not have system access.
Timesheet	A record containing time logs.
Use Tax Flag	A check box located on the Purchase Order and Purchase interfaces. Check the box at record entry when a purchase qualifies for Use Tax taxation.
User Group	A group of system users with the same access and data requirements.
Users	A person with system access.
Workflow	The movement of work (or information) from one process (or module) to another.
Workflow Automation	The effortless movement of information caused by a predefined set of events.