






Menu Structure & Module Definition

Internal	
Team Members	Records of employees and other resources such as contractors. Tracks contact information and HR details such as approving supervisors, timesheet settings, pay rates, important dates, etc.
Offices	Records of specific locations. Can be used to segregate departments or cost centers.
Notices	Messages generated by the system or by a user and sent to one or more people. Can be delivered through aACE, email or SMS.
Documents	Lists of documents stored in aACE. Provides links to view and download. Can see which records the document is attached to.
Timesheets	A record containing time logs. Management staff can have extended access privileges.
Time Clock	Activates the time clock feature that records time spent by job and task.
DL / aACE Launcher	Activates a download for the aACE Launcher. The launcher is the desktop icon that launches aACE.
CRM & Sales	
Companies	Customers, vendors and other formal relationships. These records are attached to transactional records (leads, orders, invoices, receipts, purchases, etc) and the work orders related to those transactions.
Contacts	Real people. These records are most often attached to Company records.
Leads	AKA - Sales Leads. Specific business opportunities. These records will most likely have pending orders, which are referred to as estimates.
Accounts	Records that track vendor purchasing and customer billing activities. Most often used to track related transactions such as contracts. This module also features automated purchasing and billing.
Campaigns	Records that track marketing campaigns for profitability.
Lists	Collections of company or contact records. Typically used for mailings or marketing campaigns.
Emails	Email copies that are cc'd to aACE and attached to contact records and system users.



Menu Structure & Module Definition

 Order Management			
Projects	Records used to manage a large-scale undertaking, typically requiring budgets and multiple orders with related jobs.	Tasks	Records that track the completion of a single item of work. Can have assigned time budgets. Can link to Lead or Job records.
Orders	Single transactions of one or more items or services sold to a customer. Often grouped as part of large-scale projects.	Shipping Log	Records that track the delivery of items coming in and going out. Entries affect inventory counts for items marked as Inventory Items.
Jobs	Records used to manage the fulfillment of an order. These records track associated budgets, costs, procurements and tasks.		
 Order Setup			
Categories	Records that define the items and services that you build, buy and/or sell.	Templates	Records that store predefined line items. Can be used in Campaigns, Accounts, Orders, POs, and Shipments.
Rate Cards	Records containing a predefined pricing scheme. Can be linked to Company or Order records.	Task Groups	A group of tasks assembled as a template that defines an order of operation, the normal time allotments and labor budgets. Can be linked to Categories, Orders, and Leads.
 Accounts Payable			
Purchase Orders	Anticipated purchases of specific items or services. aACE POs are tracked as estimated costs and do not affect the accounting system.	Disbursements	Entries that record the outflow of funds. These records affect the accounting system.
Purchases	Actual expenses related to the purchase of specific items or services. aACE Purchases affect the accounting system.		



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Accounts Receivable			
Orders Invoices	<p>Single transactions of one or more items or services sold to a customer. Often grouped as part of large-scale projects.</p> <p>Billing records listing the items and services with respective pricing and the total amount due.</p>	Receipts	<p>Records that record the inflow of funds. These records affect the accounting system.</p>
Inventory			
Categories Inventory	<p>Records that define the items and services you build, buy and/or sell.</p> <p>A list of inventory lots.</p>	Inventory Adjustments	<p>Records that transfer or adjust inventory counts.</p>
Accounting			
GL Accounts GL Budgets Bank Recon	<p>AKA – Chart of Accounts. A list of general ledger accounts that make up the accounting system.</p> <p>An interactive module that allows you to create budgets by GL account.</p> <p>An interactive module that allows you to balance bank credit card statements.</p>	Tax Profiles Commission Statements	<p>Records containing a predefined sales tax structure. Can be linked to a Company record. Can also be selected at the Order level.</p> <p>An interactive module that allows you to create commission statements.</p>
System Administration			
aACE Preferences Notices Notice Setup	<p>System settings that define system functionality and behavior.</p> <p>Messages generated by the system or by users and sent to one or more people. Can be delivered by the aACE system, email or SMS.</p> <p>Templates designed for system-generated notices.</p>	Notice Groups Postal Setup User Groups	<p>A collection of team members with common oversight responsibilities that should receive specified notices.</p> <p>Templates used for designing format preferences related to telephone and postal formatting.</p> <p>A group of system users with the same access and data requirements.</p>