

System Overview - Read Me First

Last Modified on 05/23/2018 7:34 pm EDT

General Overview

aACE is a complete accounting, contact management and enterprise resource management system that can manage your entire business. The system is intuitive and easy to learn, so users spend less time in training.

The modules are grouped by function in the Main Menu and related records are linked throughout the interfaces, so users can easily find their way around. For more information on general system conventions, refer to the topics in [Getting Started with aACE](#).

Main Menu

The Main Menu is used to navigate the system. The modules are grouped into sections identified by the folders at the top level. Clicking a selection opens the folder to the modules inside.

The top part of the menu contains quick access buttons to the Notices and Dashboard modules. Notices are messages generated by the system or a user and linked to relevant records. The Dashboard gives management a graphic overview of the financial statements and a snapshot of current and aging receivables and payables.

The bottom part of the menu contains quick access buttons to the Tasks, Co-Workers, Timeclock, Calendar, and Zoom Preferences modules. It also contains links to the New Call Entry and Offices modules.

Overview Topics by Menu Section

The following menu groupings are the default configuration of the aACE Main Menu. You will find that some menu sections overlap in modules and that is by design. Keep in mind that aACE is customizable, so you can design the menu to fit your workflows.

[Internal](#) includes access to modules for managing team members, offices and departments, notices, documents, timesheets, the time clock, and downloading a system

launcher.

[CRM & Sales](#) includes access to companies, contacts, leads, campaigns, lists, and emails.

[Order Management](#) has modules for projects, orders, jobs, tasks and shipping.

[Order Setup](#) contains the modules for setting up your products, services, and pricing. It includes line item codes, rate cards, templates and task groups.

[Accounts Payable](#) includes the modules for cash outflows, i.e. purchase orders, purchases and disbursements.

[Accounts Receivable](#) includes the modules for cash inflows, i.e. orders, invoices and receipts.

[Inventory](#) has modules for managing line item codes, inventory and inventory adjustments.

[Accounting](#) is where you will find GL accounts, budgets, general journals, bank reconciliation, tax profiles and commission statements.

[System Administration](#) includes access to modules for aACE preferences, notice setup and management, postal setup and user group management.
