

Configuring the aACE Orders App


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This guide explains how to set up the Orders app. It is intended for system administrators.

The aACE Orders App allows you to view existing orders that are in Open status, review their details, and also create new orders. It is designed for individual users to use on their iPad.

Before You Start

The system administrator needs to complete the following:


1. [Configure aACE for mobile apps](https://aace5.knowledgeowl.com/help/configuring-aace-for-mobile-apps) (<https://aace5.knowledgeowl.com/help/configuring-aace-for-mobile-apps>).
2. Obtain the app by emailing a request to [aACE Support](#) , then deploy it on the needed devices.
3. Optionally, configure your aACE server for [remote access](http://aace5.knowledgeowl.com/help/enabling-remote-access-to-your-aace-system-fms-18) (<http://aace5.knowledgeowl.com/help/enabling-remote-access-to-your-aace-system-fms-18>).
4. In aACE, [set up the user records](http://aace5.knowledgeowl.com/help/creating-new-users) (<http://aace5.knowledgeowl.com/help/creating-new-users>) for Orders App users.
Note: Users *cannot* be logged in simultaneously on two devices. For example, if a user opens aACE on a desktop, then submits a new order from the app, the desktop session will be shut down.
5. If desired, configure aACE for Guest Checkout workflows. This requires creating a company record for "Guest Checkout", then specifying this company at the aACE Mobile preferences file.

Configuring the App

After downloading the app to a device, the first time you open it, the app will display the Settings screen for configuration:

- aACE Server Address – Enter the IP or DNS alias for your aACE server. If you do not know this address, please consult your system administrator.
- aACE File Name – Enter the name of the aACE Mobile file hosted on your server. Unless your system has been renamed, this should be “aACE Mobile”.
- aACE Account Name and Password – Enter the aACE login credentials for the generic

user accounts or the actual team members who will use the app.

Tap the popover button () and tap Configure App. This will download default settings and the needed master and transaction data from aACE.

Using the App

After you finish configuring the app, tap Done to start the initial data sync and begin [using the app](https://aace5.knowledgeowl.com/help/using-the-aace-orders-app) (<https://aace5.knowledgeowl.com/help/using-the-aace-orders-app>).

Actions Menu

The Actions menu has additional options for managing data.

The app stores data temporarily, then transfers it back to aACE as the central repository. Only data that has changed in the app or in aACE is transferred. This helps maximize the speed. After extended usage though, there may be discrepancies in the data time stamps (e.g. data that exists in aACE, but doesn't show up in the app). Resetting the data quickly creates a new baseline of accurate records.

- **Configure** – Verifies the server connection, resets the app data, downloads any needed settings from your aACE Mobile file, and refreshes all master data, then all transaction data. This may take a significant amount of time if you are storing a large amount of master and transaction data in your app.
- **Done** – Refreshes the transaction data and opens the app for use.
- **Refresh Transaction Data** – Syncs all transaction data on demand (see below for details).

Note: Transaction data is refreshed regularly during normal use of the app, but irregularities may occur due to the nature of syncing. If you notice issues with the data, you can troubleshoot by tapping this link to get a clean update from aACE.

- **Refresh Master Data** – Syncs all master data (see below for details).

Note: Master data is only updated when the app is initially configured or when you manually refresh it. This minimizes the data synced between the app and aACE. If your team updates any relevant master data in aACE, manually refresh master data in the app to retrieve the latest data.

- **Reset App** – Wipes all data from the app. After this reset, you must re-configure the app.

Note: Resetting data clears out information that isn't being used, which helps maintain the app's responsiveness.

Orders App Master Data

- Line item codes in Active status
- Contacts in Active status

Orders App Transaction Data

- Orders in Open status

Orders App Specific Settings

These settings can help customize the app to your company and personal workflows.

- Use Google Maps – Changes the default mapping software from Apple Maps to Google Maps.
 - Use device camera – Allows you to scan bar codes without a bar code scanning tool.
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