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Menu Structure & Module Definitions

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.
Teams	Records of groups of users. Can be used to send notices to an entire team at once.
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.
D/L aACE Launcher	Activates a download for the aACE Launcher, a desktop icon that launches aACE.
Details >	Records of departments, office bins, and time.

CRM & Sales	
Companies	Customers, vendors, and other formal relationships. These records are attached to transactional records (leads, orders, purchases, etc.) and the work orders related to those transactions.
Contacts	Real people. These records are most often attached to company records.
Leads	Sales leads, or specific business opportunities. These records will most likely have pending orders, which are referred to as estimates.
Campaigns	Records that track marketing campaigns for profitability.
Lists	Collections of company or contact records. Typically used for mailings or marketing campaigns.
Emails	Copies of emails that are CC'd to aACE and attached to contact records and system users.
Details >	Records of activities.

Menu Structure & Module Definitions

Order Management	
Projects	Records used to manage a large-scale undertaking, typically requiring budgets and multiple orders with related jobs.
Orders	Single transactions of one or more items or services sold to a customer. Often grouped as part of large-scale projects.
Jobs	Records used to manage the fulfillment of an order. These records track associated budgets, costs, procurement, and tasks.
Job Costs	Records that track costs associated with a job.
Tasks	Records that track the completion of a single item of work. Can have assigned time budgets. Can link to lead or job records.
Shipping Log	Records that track the delivery of items coming in and going out. Entries affect inventory counts for items marked as inventory items.
Details >	Records of order items and shipping log items.

Order Setup	
Line Item Codes	Records that define the items or services that you build, buy, and/or sell.
Rate Cards	Records containing a predefined pricing scheme. Can be linked to company or order records.
Templates	Records that store predefined line items. Can be used in Campaigns, Accounts, Orders, POs, and Shipments.
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 Line Item Codes, Orders, and Leads.
Details >	Records of bill of materials, LI code options, rate card items, template items, and task group items.

Accts Payable	
Purchase Orders	Anticipated purchases of specific items or services. POs are tracked as estimated costs and do not affect the accounting system.
Purchases	Actual expenses related to the purchases of specific items or services. Purchases affect the accounting system.
Disbursements	Entries that record the outflow of funds. These records affect the accounting system.
Details >	Records of PO items, purchase items, and disbursement items.

Menu Structure & Module Definitions

Accts Receivable	
Orders	Single transactions of one or more items or services sold to a customer. Often grouped as part of large-scale projects.
Invoices	Billing records listing the items and services with respective pricing and the total amount due.
Receipts	Records that record the inflow of funds. These records affect the accounting system.
Details >	Records of invoice items and receipt items.

Inventory	
Line Item Codes	Records that define the items and services you build, buy, and/or sell.
Inventory Transactions	Entries that record the movement of inventory into, around, and out of your system.
Inventory Lots	A list of inventory lots.
Inventory Usage	Records of where and how inventory is used.
Inventory Adjustments	Records of adjustments made to inventory.
Details >	Records of inventory adjustment items and manufacturer lot balances.

Accounting	
Preferences	System settings that define functionality and behavior.
GL Accounts	The Chart of Accounts, a list of General Ledger accounts that make up the accounting system.
GL Budgets	An interactive module that allows you to create budgets by GL account.
General Journal	Records of all accounting transactions.
General Ledger	Records of all accounts.
Check Register	Records of all outgoing checks.
Bank Reconciliation	An interactive module that allows you to balance bank credit card statements.
Tax Profiles	Records containing a predefined sales tax structure. Can be linked to a company record. Can also be selected at the order level.
Comm Statements	An interactive module that allows you to create commission statements.

Menu Structure & Module Definitions

Accounting (continued)	
Recurring Transactions	Records of transactions that are set to automatically recur.
Details >	Records of GL budget items, general journal items, bank statement items, tax profile items, commission statement items, and recurring transaction items.

System Admin	
Preferences	System settings that define functionality and behavior.
Mobile preferences	System settings that define functionality and behavior within mobile apps.
Notices	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.
Notice Setups	Templates designed for system-generated notices.
Postal Formats	Templates used for designing preferences related to telephone and postal formatting.
Postal Codes	Lists of postal codes and related information.
User Groups	A group of system users with the same access and data requirements.
System Logs	Records of everything that has been done in aACE.
Developer >	Records of modules and custom menu options. Can be modified by a certified FileMaker developer.

Terminology

aACE	The premier business software suite developed by Avant Garde Information Solutions, LLC
aACE Preferences	System settings that define 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.
Client/Customer	The paying entity (represented by a Company record) receiving goods and/or services. The terms "client" and "customer" 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 to a Company record.
CRM	An acronym for Customer 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 approved by a 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 budget, costs, procurement, and tasks.

Terminology

Launcher	The desktop icon that launches aACE.
Lead	A specific business opportunity, or sales lead, that will most likely have pending orders, referred to as estimates.
Line Item Code	A record that defines an item or service that you buy and/or sell.
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 an aACE user and sent to one or more aACE Team Members or notice groups using one or more delivery methods (aACE Notice, email, and/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 the 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 tracks the completion of a single item of work. Can have assigned time budgets.

Terminology

Task Group	A group of tasks assembled as a template that defines an order of operation, the normal time allotments, and stated labor budgets. Can be linked to Orders, Leads, and Line Item Codes.
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	A person with system access.
User Group	A group of users with the same access and data requirements.
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.