

Step 2: Configuration & Customization

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This guide describes the configuration and customization phase of aACE implementation. It is intended for new users.

After you have completed [your discovery process and needs assessment](https://aace6.knowledgeowl.com/help/step-4-discovery-and-your-needs-assessment) (<https://aace6.knowledgeowl.com/help/step-4-discovery-and-your-needs-assessment>), it is time to configure, customize, and test your aACE solution.

Configuration

Configuration refers to setting preferences, enabling integrations, uploading logos, and specifying essential OOTB settings.

Customization

Customization refers to modifying the code for aACE, designing a system that fulfills your company's unique needs.

Prioritizing Your Customization Requirements

As we progress through Discovery, your team will likely identify some areas that require customization. These customizations can vary from small system tweaks to major workflow changes. To keep your project running on time and on budget, the developers at aACEsoft divide these requirements into two buckets:

- **The Must-Have List** — These customizations must be in place before the go-live date. To bring your system live as quickly as possible, we recommend focusing on customizations that bridge gaps in workflows or that drastically improve efficiencies and will show big returns early on.
- **The Wish List** — These customizations would be “nice to have” in the future, but they are not required for the go-live. We often postpone the detailed discussions about these customizations until the staff has fully settled into the new system. Your advisor revisits this list with you later and discusses the priorities in greater detail. Then we plan for ongoing system enhancements, working within your timeline and budget.

During the customization period, your aACEsoft advisor conducts review meetings. At each meeting, recent changes will be demonstrated. Your team will test the changes in your sandbox and approve them incrementally to minimize the risk of potential mistakes. You will

use your data and your workflows, which makes it easier to identify correct results.

At the end of the customization phase, we examine your new system together. This last review ensures that the final changes meet your expectations. The Discovery Team and company leaders approve the new processes and workflows.

User Acceptance Testing / Completion of Work Cycle

The aACEsoft team continues to train the Discovery team on all relevant aspects of the aACE system. We also manage the design and development process, provide status updates, and ensure that the project is progressing according to the Development Plan. We will review progress with project leaders and answer any questions that may have surfaced during development. With each service block, we perform the necessary work to complete the project requirements as outlined in the Final Proposal.

By the end of the Configuration and Customization phase, you will have an aACE solution tailored to your business, plus a core group of leaders within your company who can introduce the solution to the rest of your users. At this point, many customers are ready to accept the software and pay the licensing fees. Licensing usually accounts for 50% or more of the project's total costs. The Go-Live Date is scheduled once the license fee is paid.

When final approval is granted, the aACEsoft team begins data migration, if required.

Next Step

[Step 3 – Data Migration](https://aace6.knowledgeowl.com/help/step-3-data-migration) (<https://aace6.knowledgeowl.com/help/step-3-data-migration>)
