System Overview - Read Me First

Last Modified on 10/10/2025 4:50 pm EDT

This guide provides an introduction to a standard, out-of-the-box aACE system. It is intended for beginning users.

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.

Functionality in aACE is divided across various modules. These modules are grouped by function in the Main Menu. 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 (https://aace6.knowledgeowl.com/help/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. Click a folder to display the related modules.

The top part of the Main Menu contains quick access buttons to the Notices and Dashboard modules. Notices are messages generated by the system or a user. They are often 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, and Zoom Preferences modules. It also contains a link to the New Call Entry module.

Overview Topics by Menu Section

Some menu sections overlap in modules. This is by design because different users might have access to different sections of the Main Menu. Keep in mind that aACE is customizable, so you can design the menu to fit your workflows.

The following menu groupings are the default configuration of the aACE Main Menu. You

can click the section title to review more details about that area.

- Internal (https://aace6.knowledgeowl.com/help/overview-of-the-internal-modules) — Modules for managing team members, offices and departments, notices, documents, timesheets, the time clock, and downloading a system launcher
- CRM & Sales (https://aace6.knowledgeowl.com/help/overview-of-crm-and-sales) — Modules for companies, contacts, leads, campaigns, lists, and emails
- Order Management (https://aace6.knowledgeowl.com/help/order-management) — Modules for projects, orders, jobs and their costs, tasks, and shipping
- Order Setup (https://aace6.knowledgeowl.com/help/overview-of-order-setup) — Modules for setting up your products, services, and pricing. It includes line item codes (LICs), rate cards, templates, and task groups.
- Accounts Payable (https://aace6.knowledgeowl.com/help/accounts-payable) — Modules for cash outflows (i.e. purchase orders, purchases, and disbursements)
- Accounts Receivable (https://aace6.knowledgeowl.com/help/accounts-receivable) — Modules for cash inflows (i.e. orders, invoices, and receipts)
- Inventory (https://aace6.knowledgeowl.com/help/inventory) — Modules for managing line item codes (LICs) and other aspects of product tracking
- Accounting (https://aace6.knowledgeowl.com/help/accounting) — Modules for general accounting preferences, GL accounts, budgets, general journals, general ledger, check register, bank reconciliation, tax profiles, commission statements, and recurring transactions
- System Administration (https://aace6.knowledgeowl.com/help/overview-of-system-admin) — Modules for aACE preferences, notice setup and management, postal setup, formats and codes, as well as user group management